



Process Optimization Tool - User Guide

Overview

The Process Optimization Tool is designed to help teams identify waste in their workflows and design optimized future states using AI-powered analysis. The app follows a structured methodology: Training → Define Workflows → Conduct Waste Walk Sessions → AI Analysis → Future State Design

Main Navigation Modules

Module	Icon	Purpose
Dashboard		Overview of your progress and activity
Training		Learn the waste identification methodology
Workflows		Create and manage process workflows
Sessions		Conduct collaborative waste walk sessions
Future State Studio		AI-powered process redesign
Analytics		Insights and reporting
Admin		User and organization management (admin only)

Step 1: Complete Training

Navigate to: Sidebar → Training

Purpose

Learn the 8 types of waste (TIMWOODS) and how to identify them in processes.

Steps:

1. View the Training Progress bar at the top
1. Browse training modules organized by category
1. Click on a module to view content (videos, slides, articles)
1. Complete modules sequentially (some may be locked until prerequisites are done)
1. Take quizzes to test your knowledge

Pro Tip:

Access the Waste Cheat Sheet anytime via the sidebar for quick reference during waste walks.

Step 2: Create a Workflow

Navigate to: Sidebar → Workflows → "+ New Workflow"

Purpose

Define the process you want to analyze before conducting a waste walk.

Steps:

1. Click "+ New Workflow" button
1. Enter a Name (e.g., "Customer Onboarding Process")
1. Add an optional Description
1. Click "Create Workflow"

After Creation:

1. You'll be taken to the Workflow Editor
1. Add Swimlanes (departments/roles involved)
1. Add Process Steps to each lane
1. Connect Steps with arrows to show flow
1. Click the Context icon () to add rich context for AI:
 - Process overview
 - Stakeholders
 - Systems used
 - Key metrics

Import Option:

You can also Import existing workflows via JSON format.

Step 3: Start a Waste Walk Session 💬

Navigate to: Sidebar → Sessions → "+ New Session"

Purpose

Collaborate with your team to identify waste in the workflow.

Steps:

1. Click "+ New Session"
1. Select a Workflow from the dropdown
1. Enter a Session Name (e.g., "Q1 Process Review")
1. Click "Create Session"

During the Session:

1. You'll see the Process Map with all steps
1. Click on any step to open the detail panel
1. Click "Add Observation" to tag waste:
 - Write your observation notes
 - Select waste types (multiple allowed)
 - Set priority/impact score
1. The map shows a heatmap indicating problem areas
1. Real-time collaboration: Team members see updates live

Session Controls:

- View Participants: See who's currently in the session
 - Toggle Heatmap: Show/hide the priority heat overlay
 - End Session: Complete the waste walk when done
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Step 4: Enter Future State Studio ✨

Navigate to: Sidebar → Future State Studio → Select a Session

Purpose

Use AI to synthesize observations, generate solutions, and design the optimized future state.

The 6 Stages:

Stage 1: Synthesis Hub

- Click "Run Synthesis" to have AI analyze observations
- AI groups observations into Themes with root cause hypotheses
- Review and Confirm or Reject themes
- Edit theme names and summaries as needed

Stage 2: Solution Builder

- Click "Generate Solutions" to create solution proposals
- Solutions are organized by type:
 - Eliminate - Remove wasteful steps
 - Modify - Improve existing processes
 - Create - Add new capabilities
- Review solutions and mark as Accepted or Rejected

Stage 3: Roadmap Builder

- Click "Generate Roadmap" to sequence solutions
- AI organizes into Implementation Waves
- View dependencies between solutions
- Adjust sequencing as needed

Stage 4: Future State Designer

- Click "Generate Design" to create the redesigned process
- View in different modes:
 - Flowchart View: Interactive swimlane diagram
 - Side-by-Side: Compare current vs future state
 - Future Only: Focus on the new design
- Click on nodes to:
 - See linked solutions
 - Design detailed step specifications
 - Answer AI questions for better designs

Stage 5: Compare View

- Side-by-side comparison of current and future states
- Visual highlighting of changes

Stage 6: Export Panel

- Generate reports and presentations
 - Export as PowerPoint, PDF, or other formats
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Step 5: View Analytics

Navigate to: Sidebar → Analytics

Purpose

Gain insights from your waste identification efforts.

Features:

- Waste by Type: See distribution of waste categories
 - Priority Scores: Identify highest-impact areas
 - Step Hotspots: Which process steps have most issues
 - Session Comparisons: Compare before/after metrics
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Quick Tips

Keyboard Shortcuts

- Most interactions are click-based for accessibility

Mobile Access

- The app is fully responsive
- Bottom navigation on mobile devices
- Sheets slide up from bottom instead of side panels

Collaboration

- Multiple team members can work simultaneously
- Real-time updates with presence indicators
- Green dots show active users

AI Features

- All AI generations can be re-run with `forceRerun: true`
 - Toast notifications confirm success/failure
 - Check browser console for detailed logs if issues arise
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Workflow Summary

 Training (learn methodology)

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 Create Workflow (define process)

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 Add Context (enrich with AI context)

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 Start Session (conduct waste walk)

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 Add Observations (tag waste on steps)

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 Future State Studio:

1. Synthesis → Group into themes
2. Solutions → Generate improvements
3. Roadmap → Sequence implementation
4. Designer → Create future state
5. Compare → Review changes
6. Export → Share with stakeholders

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 Analytics (track progress)

This guide covers the main user journey. Would you like me to create a more detailed guide for any specific module, or export this as a document?