

Methodology Selection Guide

Choose the right discovery approach based on client symptoms

Lean

Best for: Client complains about slow turnaround times, excessive steps in a process, cluttered work environments, or high costs without perceived value added.

Key Principle: Maximize customer value by systematically identifying and eliminating waste (Muda) in processes to improve speed and flow.

Discovery Focus: Identifying non-value-added activities (the 8 wastes), analyzing process complexity, and finding barriers to continuous flow.

Sample Questions:

- Which specific process steps is the customer willing to pay for, and which are just internal bureaucracy?
- Where does work sit idle waiting for approval, information, or materials?
- How much effort is spent fixing errors or re-doing work that wasn't done right the first time?

Six Sigma

Best for: High defect rates, inconsistent product/service outcomes, unpredictable process performance, or a high volume of customer complaints regarding reliability.

Key Principle: Improve process capability and quality by identifying, quantifying, and removing the causes of defects and minimizing variability.

Discovery Focus: Collecting quantifiable data on defects, measuring process variation against specifications, and identifying root causes of errors (DMAIC focus).

Sample Questions:

- What is the current quantifiable defect rate and how exactly is it measured?
- Which specific process inputs show the most variation that affects the final output quality?
- Do we have reliable data to define the baseline capability of the troubled process?

Theory of Constraints (TOC)

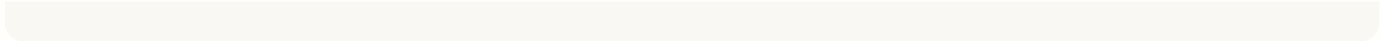
Best for: Overall output is capped despite excess capacity in most areas, work piles up visibly in front of one specific department or machine, or constant expediting is required to meet deadlines.

Key Principle: A system's throughput is limited by its scarcest resource (the bottleneck); improvements must focus exclusively there to impact overall performance.

Discovery Focus: Identifying the single constraint limiting total system throughput and understanding organizational policies that reinforce that constraint.

Sample Questions:

- Where is the biggest backlog of inventory or work-in-progress piling up right now?
- If we had infinite capacity in one specific area, would the total system output actually increase?
- What rules or policies prevent the bottleneck resource from running continuously?



ADKAR

Best for: New systems are technically sound but employees aren't adopted them, high resistance to organizational shifts, low morale during transitions, or old behaviors persisting after a rollout.

Key Principle: Successful organizational change requires guiding individuals sequentially through Awareness, Desire, Knowledge, Ability, and Reinforcement.

Discovery Focus: Assessing individual readiness for change, identifying specific people-side barriers, and evaluating communication effectiveness.

Sample Questions:

- Do the impacted employees genuinely understand the business reasons driving this change?
- Do individuals have the personal motivation ('what's in it for me') to support this change?
- What mechanisms are in place to prevent employees from reverting to old ways of working once the project team leaves?

Balanced Scorecard

Best for: Leadership has a vision but operations aren't aligned, hyper-focus on short-term financials at the expense of long-term health, or siloed departments working against each other.

Key Principle: Translate strategic vision into actionable objectives across four connected perspectives: Financial, Customer, Internal Process, and Learning & Growth.

Discovery Focus: Checking alignment between high-level strategy and daily operational metrics, and ensuring a balance of leading vs. lagging indicators.

Sample Questions:

- How does daily operational work connect directly back to the long-term corporate strategy?
- Are we measuring future capability (learning and growth) or only focusing on past performance (financials)?
- Do different departments have conflicting KPIs that hinder the overall organizational strategy?

Value Stream Mapping (VSM)

Best for: Long end-to-end lead times despite fast individual process steps, confusion about ownership across departmental boundaries, or frequent communication breakdowns between teams.

Key Principle: Visualize the entire end-to-end flow of materials and information required to bring a product to the customer to identify systemic disjoints.

Discovery Focus: Determining the ratio of value-added time to total lead time, mapping information flow triggers, and identifying friction at handoff points between silos.

Sample Questions:

- What is the total elapsed time from customer request to delivery versus the actual time spent working on it?
- How many times does the 'work' change hands across different departments or systems?
- Where does the flow of information disconnect from or stall the physical workflow?

Jobs to be Done (JTBD)

Best for: Struggling with innovation, new product launches failing to gain traction, or focusing too much on competitor features rather than addressing unmet customer needs.

Key Principle: Customers don't just buy products based on attributes; they 'hire' them to make progress on a specific job arising in their lives under specific circumstances.

Discovery Focus: Uncovering the underlying functional, emotional, and social progress the customer is trying to make, rather than focusing on product features or demographics.

Sample Questions:

- What underlying progress is the customer trying to achieve when they use this type of product?
- What were the struggling moments or anxieties that triggered them to look for a new solution?
- What existing solutions or behaviors are they 'firing' in order to 'hire' your offering?

Want to automate this?

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