

# 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?

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