

Interview Results

1. Interview Results

Department	Question	Response (The "Reality")	Implications for the Diagram
Sales Manager	Latest Time Asked / Actual Time Sent?	"We are asked to send data by the 1st EOD , but the report generation takes 12 hours. We usually send it around 9 AM on the 2nd. "	The process starts late. The hand-off event happens on Day 2, not Day 1.
Sales Manager	Data Format Sent?	"We send the data as an Excel pivot table so Finance can easily filter it. They never complained before."	Format is inconsistent. Finance must perform a manual conversion before using the data.
Operations Manager	Data Transformation Steps?	"We receive our final numbers from the production floor on the 2nd by noon . We then copy/paste them into the old template we saved from last year. We send that to Finance."	Data is not finalized until Day 2, guaranteeing a late report. Copy/paste introduces manual error .
Operations Manager	Standard Template?	"We use the one from last year. Finance hasn't sent us an updated template in months, so we assume it's fine."	Lack of a central repository for current templates, leading to version control issues.
Finance Manager	First Cleanup Step?	"The Sales pivot table must be copied into a raw CSV first, then normalized. The Ops data always has two extra columns from their legacy system. We spend 3-4 hours every month just normalizing the data."	The key bottleneck is in Finance due to poor data quality from upstream teams.
Finance Manager	Consolidated Report Storage?	"The final file is saved on the Finance shared drive as a password-protected Excel file."	Poor visibility and access control. This makes the <i>distribution</i> step difficult.

2. Workshop Results

Goal: Align on a Single As-Is Map and Define To-Be Principles

Workshop Step	Duration	Activity	Best-Practice Outcome
1. The Mirror (As-Is)	20 min	You present the three conflicting stories on a whiteboard/Confluence page. You show them the BPMN Diagram: As-Is Monthly Reporting you drafted.	Consensus on the Problem: All three managers agree: "Yes, this map clearly shows why we are late. Our individual steps create the bottleneck."
2. Pain Point Voting	15 min	Give each manager sticky notes or virtual dots. They vote on the biggest pain points (e.g., "Pivot Table conversion," "Copy/Paste from Production," "No Template.")	Prioritization: The group formally agrees that Data Format & Quality is the highest priority problem to solve.
3. To-Be Principles	30 min	Facilitate a discussion on the non-negotiable principles for the new	Agreement on Future State: They agree that the Sales/Ops

Workshop Step	Duration	Activity	Best-Practice Outcome
		process (e.g., "Must be ready by the 2nd," "No copy/paste allowed," "Only one source for the template").	Hand-off must be standardized to a single, secure data repository, bypassing email/Excel entirely.
4. Action Plan	5 min	Assign action items to validate the Feasibility Assessment (per the CEO's request).	Next Steps: Finance will investigate using a cloud-based folder (like SharePoint/Drive) with a locked template structure. You will follow up with the results.

Workshop Result: The Blueprint for the Diagram

The workshop confirms the following must be true for the **To-Be BPMN Diagram**:

1. **Sales/Ops** must submit data **before the 2nd AM**.
2. The hand-off will be via a **Standardized Digital Repository** (e.g., a shared folder with a defined template), eliminating the need for email.
3. **Finance's first task** is **Validation** (checking the completeness of the *standardized* file), not **Cleanup**.

You now have all the information needed to draw the "As-Is" (which shows the chaos) and design the "To-Be" (which shows the solution).