

IPD Think Differently Process Transformation Training™

Process Talk/Walk through for Remote Teams

A process talk/walk-through is a forum to verify that the previously formulated work steps are being followed. This conversation can also facilitate the sharing of pain points and improvement ideas. Here is a checklist of the key tasks to complete during a comprehensive process review when teams move to remote work.

- Identify which process and which process steps are included in the talk/walk through.
- Identify an employee—a process champion—to lead the review. This person leads and is accountable to accomplish the process review tasks.
- Find the most up-to-date process instructions. If none exist, draft them out before the meeting.
- Identify the purpose of the meeting as:
 1. Review and alignment on the process in the remote environment.
 2. Optionally: identify process improvement ideas.
 3. Optionally: determine low-hanging fruit to be implemented immediately.
 4. Optionally: create a plan to investigate, prototype, and/or pilot non-low-hanging fruit.
- Create a process review meeting agenda.
- Schedule a one-hour (at minimum) process talk/walk-through meeting including audio, camera view, and document-sharing capability.
- Identify and invite everyone who is responsible for the process steps to join the meeting.
- Open the process review meeting by:
 - Communicating the purpose of the meeting; delineating which process and which steps will be discussed; and clarifying attendee responsibilities.
 - Setting a tone that supports learning and adapting.
 - Identifying or developing the outcomes needed from the process.
 - Displaying the most current process instructions.
- Talk/walk through the current process instructions, having the person who does the relevant work step read and speak about the step.
- Discuss and conclude if the steps work well or have gaps when done remotely.
- Solve issues and questions that come up—and they will come up!
- Conclude with an open discussion about whether the revised process will deliver the needed outcomes.
- Update and then share the work instructions after the meeting to reflect the learnings and the agreed-upon, enhanced process.

Process champion quote: “Our process team can pull together and solve nearly anything within 30 minutes.”

