FUTUREPROOFING THE COMMUNITY SERVICE WORKFORCE

Synthesis Activity 2: Assess your process

Building Data Management Capacity

CANADIAN CENTRE FOR NONPROFIT DIGITAL RESILIENCE

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Activity Overview: Assess your process

An overview of how to assess your process and what sub-activities to expect

Activity Overview: Why assess your process?

Key Objective
This activity uses the User Story Map to help you identify potential areas for process improvement by uncovering pain points and redundancies. Additionally, it lays the foundation for identifying automation opportunities that build on existing processes rather than creating entirely new ones.

Why assess your process?

Assessing your process will enable you to:

- Deepen your understanding of how people and data interact within each step of your process.
- Gain information needed to make decisions around automation or overall process improvement.
- Increase data quality and support streamlining by combining or reducing steps if process is updated.

Activity Overview: Sub-activities to expect

2.1. Assess how users interact with the process

Reflect on guiding questions to help you asses how users are interacting with the process, highlighting both success areas and opportunities for improvement.

2.2. Assess the steps in the process

Reflect on guiding questions to help you continually assess if you process are effective by reflecting on the order, necessity and connection of each step.

2.3. Explore opportunities for automation

Reflect on guiding questions to identify simple automation opportunities by aligning automation tools with existing technology with existing processes

2. Assess your process sub-activities

2.1. Assess how users interact with the process

2.2. Assess the steps in the process

2.3. Explore opportunities for automation

Prepare for Synthesis Activity 2: Assess your process

Who should lead this activity?

The staff who created the User Story Map or someone familiar with the process and data collection.

Tip



Not all desired changes or pain points need immediate implementation. Awareness is important to be able to act on desired high-impact changes when possible.

What types of sub-activities to expect?

All these sub-activities all involve **guiding questions** to help you reflect on three key aspects of the process outlined in your User Story Map, identifying opportunities for improvement, automation, or clarification

Tip



Writing out concise responses to the guiding questions encourages intentional reflection and enables staff to validate your thoughts. If time is limited, simply reviewing the guiding questions can still serve as a helpful reference when assessing any organizational process.



How much time to estimate for this activity?

2 to 4 hours depending on the complexity of the process in the User Story Map process.

2.1. Assess how users interact with the process
(1/1)

The following questions will help you assess how users are interacting with the process, highlighting both success areas and opportunities for improvement.

Guiding Question	Follow-up questions and/or considerations if 'no' to the guiding question
1. Is the process meeting its intended objectives?	• Where is the process breaking down? Where is the process not working for specific users? Considerations • If users struggle to complete the process due to the limitations of the tool, consider training staff or implementing user feedback that could be simple adjustments to prevent bottlenecks. • If users struggle to complete tasks, review the process with the team and highlight how each step supports the organization's broader goals to clarify for users the impact of their work.
2. Are users doing all the same steps in the same order?	Considerations • If maintaining the order of steps is important, walk through the User Story Map with the users involved in the processes. Aligning on the process and setting clear expectations across the team can set clear expectations across team members, improve efficiency and foster collaboration.
3. Do the people/roles have the right skills and knowledge?	• Who might be missing or what skills are needed that aren't currently represented in the process? Synthesis Activity 3: Identify skills needs has additional tools to help answer this question Considerations • If someone is responsible for one step in the process, consider reassigning their task to others with more responsibilities in the process to streamline workflow and reduce bottlenecks.

2.2. Assess the steps in the process
(1/1)

Processes often change gradually over time with changes in technology, staff, and data needs. Reviewing each step helps assess whether the overall process is effective.

Use the questions below to reflect on the order, necessity and connection of each step.

Guiding Question	Follow-up questions and/or considerations if 'yes' to the guiding question
1. Are there steps in the process that can be combined, reordered, or removed?	If you answered yes to any of these questions, discuss potential changes with the users. For any significant proposed changes, consider drafting a prospective process that would include your proposed change. Mapping out the prospective new process can help identify key change management needs, such as additional communication or training.
2. Are there any existing client touchpoints (i.e intake forms) that can be used to collect additional data to reduce the number of client touchpoints/follow ups required in the process?	
3. If you had any data points earlier in your process, could you make a specific step go faster?	

2.3. Explore opportunities for automation
(1/1)

User Story Maps are great tools for identifying automation opportunities by aligning automation tools with existing technology with existing processes to minimize change management stressors for staff.

Examine your process to see if there are any steps or series of steps well suited for automation. We have provided some examples below:

Example Pain Points	Example Automation Solution(s)
Staff manually enter the same data in two systems, causing data quality issues and unnecessary workload.	• Explore bulk upload options for one system. • Check for built-in integrations or third-party connector software like Zapier or Power Automate, ensuring they meet the organization's security specifications (e.g., storing sensitive participant data in Canada)
Staff spend significant time emailing to schedule meetings and send reminders to clients and internal staff.	• Explore automated booking tools (e.g., Microsoft Bookings, Zoom Scheduler or Calendly), that can automate reminder emails for appointments. • Ensure staff have relevant view access to the appropriate staff calendar
Data is siloed, making it difficult to consolidate data to make decisions.	• Consider linking 2 to 3 key Excel spreadsheets with basic formulas to enable efficient data sharing and visualization. • Consider implementing a reporting tool (e.g., Microsoft Power BI) that consolidates data from exports or integrations with existing systems. This requires minimal changes to existing systems and can significantly improve data insights across the organization. However, this can be more intensive than the previous examples and could involve licensing costs.