

Contents

Acknowledgments	xiii
The Authors	xv
Introduction	1
Themes	2
About the Word <i>Process</i>	3
About Propositions	4
Investing in Process Design	5
PART ONE	
A STEPWISE APPROACH	7
1. Six Steps	9
Step 1. Complete a Process Terms of Reference	10
Step 2. Block the Agenda	12
Step 3. Develop and Confirm How the Agenda Will Flow	15
Step 4. Build a Preliminary Design	21
Step 5. Check the Preliminary Design with Others	26
Step 6. Complete the Design	27
Propositions	27

2. Guidelines for Process Design	29
Make Upstream Prevention a Priority	29
Curb the “Overs”	35
Think Strategically About Expertise	36
Listen for Mental Maps	37
Approach Time Consciously	37
Create an Environment That Supports Learning	40
Rethink Openings and Closings	42
And Finally . . .	42
Propositions	43

PART TWO

THE PEOPLE FACTORS: PERSPECTIVES, POWER, AND VALUES **45**

3. The Perspectives Factor in Process Design	47
Mining Perspectives	49
Group Participation Styles	53
Propositions	58
4. The Power Factor in Process Design	59
Types of Power	60
Power and Commitment	68
Using Power Positively	69
Propositions	71
5. The Values Factor in Process Design	73
About Values	75
A Values Hierarchy	77
Implications for Process Design	80

In Summary	92
Propositions	93

PART THREE

DUE DILIGENCE: A PROCESS TERMS OF REFERENCE 95

6. About a Process Terms of Reference 97

Maps and Territories 97

Developing a PTR 100

A Collaborative Stance 101

Practice Guidelines: Developing a PTR 104

Propositions 108

7. Understanding the Situation 109

Sample Questions for Exploring the Situation 110

Practice Guidelines: Situation 110

Examples: Situation 112

Propositions 115

8. Developing a Focus 117

Purpose 118

Sample Questions for Developing a Purpose Statement 121

Objectives, Outputs, and Outcomes 122

Sample Questions for Developing Objectives,
Outputs, and Outcomes 126

Practice Guidelines: Purpose, Objectives, Outputs,
and Outcomes 127

Examples: Purpose, Objectives, Outputs, and Outcomes 129

Propositions 133

9. Stakeholder Collaboration	135
Stakeholder Perspectives and Categories	136
Sample Questions for Identifying Stakeholders	137
Practice Guidelines: Stakeholder Collaboration	138
Examples: Key Stakeholders	142
Propositions	144
10. Core Assumptions	145
Scope	147
Sample Questions for Developing Assumptions	148
Practice Guidelines: Core Assumptions	149
Examples: Core Assumptions	151
Propositions	153
11. Key Considerations	155
Sample Questions for Developing Key Considerations	156
Practice Guidelines: Key Considerations	159
Examples: Key Considerations	160
Propositions	163
12. Work Plan	165
Sample Questions for Developing a Work Plan	166
Practice Guidelines: Work Plan	167
Example: A Simple Work Plan	168
Example: A Complex Work Plan	169
Propositions	171
13. Governance	173
Sample Questions for Developing a Governance Structure	174
Practice Guidelines: Governance	176

Examples: Governance Structures	178
Propositions	182
14. Essential Documents	183
Sample Questions for Identifying and Developing Essential Documents	185
Practice Guidelines: Essential Documents	186
Examples: Essential Documents	194
Propositions	197
15. PTR—Three Examples	199
Account Planning for a Regional Sales Group	200
Three Boards Speaking with One Voice	204
Access to Organ Transplantation in Canada: Phase 1—Kidney Allocation	210
PART FOUR	
EXPERTS AND EVIDENCE IN CONCERT	221
16. Why Evidence-Based Solutions Now?	223
Knowing What to Ask	223
Why Best Evidence Is Important	225
Ambiguity, Paradox, and Disagreement	226
Propositions	227
17. A Design for Developing Evidence-Based Questions	229
Working Through the Steps	229
Practice Guidelines: Question Development	237
And Finally . . .	241
Propositions	242

PART FIVE

SAMPLE PROCESS DESIGNS **243**

18. A Town Hall Meeting with XYZ Finance Department **245**

19. A Workshop on Mission and Values **253**

References **261**