# DIGITAL TRANSFORMATION FOR MANUFACTURERS

## FACILITATOR CHECKLIST

|  |  |  |
| --- | --- | --- |
| 1. Contact department/function heads and key stakeholders in the company:  * Present Digital Transformation for Manufacturers (DTM) objectives. * Request DTM team-member candidates who can represent their departments/functions on digitization issues, opportunities, and concerns. | 3 weeks before approximate DTM date | 🞎 |
| 1. Contact potential DTM team(s) members:  * Present DTM objectives. * Request their participation in the DTM. * Direct them to DTM Playbook materials to learn more about the improvement effort. * Identify team-member requirements (e.g., understanding of digitization levels in department/function, availability for digital assessment, planning, and improvement activities) * Offer multiple dates over a 2- to 3-week period for the DTM to secure as many team members as possible. | 3 weeks before approximate DTM date | 🞎 |
| 1. Confirm team members based on choice of dates; identify replacements for departments/functions not represented. | 2 weeks before selected DTM date | 🞎 |
| 1. Contact team members:    * Confirm their participation.    * Remind them to gather digitization needs/requirements within their departments.    * Request that team members come prepared to describe issues, opportunities, and concerns within their departments or functions — bringing with them department information (e.g., policies, work standards, performance metrics).    * Ask team members to review the DTM Assessment and the DTM Playbook materials. | 2 weeks before selected DTM date | 🞎 |
| 1. Secure meeting logistics for DTM and identify any unique team-member requirements (e.g., accessibility, dietary restrictions):  * Meeting location * Accommodations for out-of-towners (if applicable) * Meals * Videoconferencing capabilities (if virtual team members) * Meeting materials (DTM posters, whiteboard, etc.) | 2 weeks before DTM date | 🞎 |
| 1. Send reminder email to DTM team | 1 week before DTM date | 🞎 |
| 1. Identify any new issues with team-member participation and seek replacements if necessary. | 1 week before DTM date | 🞎 |
| 1. Print posters/flipcharts of DTM questionnaire using the DTM poster PDF (if applicable). | 3 days before DTM date | 🞎 |
| 1. Confirm all logistics details are as expected/contracted. | 3 days before DTM date | 🞎 |
| 1. Send a “Welcome” email to team members; provide specific logistics details and directions for the DTM:  * In-person (e.g., location, room number, travel times) * Virtual/remote (e.g., videoconference website, call-in numbers) | 1 day before DTM date | 🞎 |
| 1. Conduct the DTM:  * Train team on the DTM process; use the Facilitator Guide PPTX (30-60 minutes). * Provide answers to the DTM online questionnaire (1-3 hours); time will vary based on digital complexity of the organization and familiarity with topics in the DTM questionnaire. * Review DTM output and identify weaknesses and constraints; time will vary based on digital complexity of the organization and issues identified. * Identify time and date for team to reconvene for Improvement Planning. * Request that team members share DTM output with departments/functions and other stakeholders, and that they enlist colleagues to join them for Improvement Planning. * Direct team members to DTM Toolbox support materials that may help them with Improvement Planning (e.g., DTM Improvement Plan, DTM Improvement Plan Instructions).  *Note: Previewing the DTM assessment process with the Day-of-Assessment Guide, completing the assessment questionnaire, and reviewing DTM output can occur in a morning; preparation for improvement planning can take place in the afternoon.* | DTM date | 🞎 |
| 1. Anonymously share details of your improvement projects at a brief [Digital Transformation Improvement Projects online questionnaire](https://mpigroup.qualtrics.com/jfe/form/SV_afSHOurpU2QiMXI). Submitted examples will be available online in a DTM Case Study database — offering insights for you and other manufacturers regarding digital best practices, technologies, and challenges. | As improvement projects get underway | 🞎 |