# DIGITAL TRANSFORMATION FOR MANUFACTURERS

## FACILITATOR CHECKLIST

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| 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  | 🞎 |