REPRESENTATIVE PORTFOLIO SAMPLE

From Complexity to Clarity: Participant Workbook

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Session Goal

Use this workbook to diagnose a real process that feels harder than it should and identify the kind of support people actually need.

1. Four-Lens Diagnostic

People	Process	Technology	Performance
Knowledge, skill, confidence, feedback	Steps, handoffs, decisions, clarity	Tools, systems, access, searchability	Expected behavior, context, reinforcement

2. Current-State Process Map

Process I want to examine:

_____

Where people start:

_____

Where they get stuck:

_____

Where they leave the workflow to search, ask, guess, or rework:

_____

What the ideal future state should make easier:

_____

3. Scenario Practice

A new team member knows a process exists but cannot find the current version. They ask three people, receive two outdated links, and finally locate the current document after repeated searching.

Which lens best explains the barrier?

_____

What evidence supports that diagnosis?

_____

What intervention would help most?

_____

What follow-up would confirm whether the solution worked?

_____

4. My Action Commitment

One process I can simplify:

_____

One support people need:

_____

One next step I will take:

_____

One person I need to involve:

_____

Key Reminder

Not every performance problem is a training problem.

Sometimes people need instruction. Sometimes they need practice, feedback, clearer expectations, a better job aid, a simpler process, or a system that is easier to use.