

Process Design Session

Presented by:

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Goal

- To present how I would plan and execute a process design session

Scenario

- Hospital X has a sick calls process that is problematic
- Cumulus has proven solution that could address Hospital X's problem
- Already interviewed several people
- Formulated some ideas for improvements
- Aware other people have ideas for improvements
- Know the key participants

Assumptions

- Fully conversant with Cumulus' staff scheduling process
- This session deals only with sick calls process, which is part of the larger staff scheduling process
- Make take several sessions to complete the design process

Meeting Preparations

- Ensure support from senior management
- Confirm what information participants already have:
 1. Design process
 2. Cumulus staff scheduling process
- Clarify participants' involvement and role in the design process
- Ensure logistics are in place
- Be prepared to record meeting results
- Plan a break

Initial Session

- Welcome and introductions (10 min.)
- Explain the design process (10-15 min.)
 - Define roles of facilitator and participants
 - What we are trying to achieve
 - How we will do this
 - Session one of possibly several sessions
 - Highlight benefits of the design process
- Presentation of Cumulus staff scheduling process (10-15 min.)

Initial Session – cont'd

- Have discussions on the current sick calls process: (1-1.5 hrs)
 - Determine the problems
 - Assign priorities for resolution
 - Confirm perspective from each functional group:
 - Nurse managers
 - Payroll manager
 - HR representative
 - Nursing director
- **Break** (15 min.)
- Discuss how Cumulus addresses problems (15 min.)
- Distribute questionnaires (5 min.)
 - Elicit more information
 - Give participants time to reflect on initial session

Wrap-up

- Questions and answers (10-15 min.)
- Schedule next session (10 min.)
 - Set date for return of questionnaires prior to next session
 - Provide my contact information
 - Arrange further data gathering, interviews, or one-to-one meetings
- Collect participants contact details (5 min.)

Expected Outputs

- Clearer picture of problems with sick calls process
- Better understanding by participants of Cumulus' benefits
- Confirmation Cumulus' staff scheduling process addresses shortfalls of sick calls process
- A priority list for sick calls process problems
- Participants leave session feeling they “own” the design process
- Participants excited about being part of the solution

Follow-up Activities

- Did not achieve everything in one session
- Additional interviews may be necessary
- Dealing on one-to-one
- Timelines dependencies – one day to multiple days, maybe even weeks

Sequence of Activities

- Describe the design process sequence of activities
 - Overview of the scope and focus:
 - Expectations and encouragement
 - Pre-session
 - Small group planning
 - Group brainstorming
 - Group design process

Sequence of Activities

- Pre-session activities
 - Questionnaires
 - Interviews
 - Review of background material
 - Research
 - Meetings
 - Project orientation

Sequence of Activities

- Group planning activities
 - Identify and document issues, what the problem is, possible solutions
 - Generate, categorize, and document ideas, concepts, values, priorities
 - *Next step*

Sequence of Activities

- Group brainstorming activities
 - Generate and document ideas for improvements
 - Role play
 - Define core principles
 - *Next step*

Sequence of Activities

- Group design process activities
 - Negotiate and reach consensus on preferred process
 - Identify actions and prioritize the design process
 - *Next step*