Process Triage - What is it?

A fast, results-focused process and team improvement protocol

A Medical Triage assesses patients, determines how severe their injuries are and then treats them in the right order within available capabilities.

In Process Triage, our patients are business processes and instead of injuries we have inefficiencies and other types of pain points that hinder the process’s performance objectives.

At ProcessTriage®, we leverage your staff’s expert process knowledge using a fast yet effective process triaging protocol to identify the most valuable improvement action items, called Small Now’s℠, and projects, called Big Now’s℠, to work on immediately.

Simply select the business process (the patient), your triage team members, and the full-day venue.

Trust our Process Triage® facilitator to lead your team to a slate of improvements to launch immediately, all bought-in and focused on your goal. Small Now’s℠ and Big Now’s℠ that cannot be scheduled, called Not Yets℠, outline the business case for managing upward and acquiring additional resources. Use our Process Triage® Workshop to bind your team to your vision and give you a clear, achievable path toward your high-performance team goals.
Business Process Triage

In a medical triage, patients are examined to provide appropriate medical care to the most urgent needs within the resources available. In Business Process Triage, our patients are business processes. The points-of-pain we triage are process inefficiencies or dysfunctions that hinder the process’s performance goal. These pain points are identified by a triage team consisting of your in-house experts comprised of those who lead and perform the process day-to-day, hosted by their manager or responsible executive.

We guide your triage team to identify Small Now™ action items and Big Now™ projects that resolve the pain points, then rank these remedies by criteria that triage them for immediate process improvement results. These action items and project proposals are practical and achievable based on the team’s expert knowledge of current capabilities, fit the host’s process goals, and deliver results within 90 days if implemented.

**Agenda**

- **Opening Remarks (Executive Sponsor)**
- **ACTION>RESULTSM** Mapping
  - 2 hours, Team + Facilitator
- **Triage Examinations**
  - 2 hours, Team + Facilitator
- **Strategic Objective Review**
  - After lunch, Executive Sponsor
- **Points-of-Pain**
  - 1-2 hours, Team + Facilitator
- **Small Now’s & Big Now’s**
  - 2-3 hours, Team + Facilitator + Sponsor
  - Action Items (Small Now’s), Projects (Big-Now’s)
- **Closing Remarks & Satisfaction Survey.**

**The Workshop Investment**

- A **day of your process expert’s time** plus any related travel.
- A **Facilitator fee** billed per workshop. This rate includes the facilitators pre-work, workshop facilitation, and post-workshop documentation. Incidental travel, lodging, and meals are invoiced (at cost).
- **Host site costs if any.** An in-house conference typically works well.

**Deliverables**

- **90 days of bottoms-up, tactically sound improvement proposals aligned with top-down strategic objectives.**
- An **end-to-end process improvement prioritization.** The entire process leadership team agrees on what to improve first, then next, and so on.
- A **set of delayed action items and projects to business case.** Use these delayed proposals to jump start your business case for additional resources.
- An **ACTION> RESULT Process Map for reuse.** The process map has a long shelf life, ideal training and process analysis use.
- **Baked-in Team Building Benefits** throughout the day, including a shared understanding of your process’s scope of work, current workflow performance, and the professional satisfaction of knowing their team.
- **Very cost effective use of your experts’ team development time.**

Contact: Joseph (Rosey) Rosenberger
Consulting Facilitator, Process Triage
913-269-3410

www.processtriage.com

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**Process Triaging Primer**

*Process Triaging* is a business process improvement protocol for organizational leaders including executives, functional area owners, and subject matter experts / front line process performers. All three levels of expertise are required to successfully triage.

The *Process Triage® Protocol* is designed for executives who are comfortable with issuing enterprise performance objectives (top down) and expect tactical solutions and investment recommendations to come from front line expert performers (bottoms up), with resourcing recommendations from managers.

If an executive or manager does not have 90 days of bottoms-up process improvement proposals for a mission-critical process, host a 1-day *Process Triage® Basic Workshop* to generate them.

Process triaging begins with an Executive Sponsor, typically a C-level executive. This leader selects the business processes to triage and delegates the appropriate subordinate leader to host the workshop(s). This host is usually the process owner (by any equivalent organization chart title).

The *Host* transposes the enterprise’s overall financial and non-financial objectives into their *Process Capability Goal* (PCG). The host selects the triage team members from the process’s subject matter expert performers. The workshop is scheduled when additional readiness criteria are met.

The triage workshop is led by a certified Process Triage® facilitator. The facilitator guides the team through the Process Triage® Protocol that yields typically two dozen improvement deliverables that, if implemented, deliver improvements toward the host’s PCG and subsequently, the sponsor’s enterprise objectives.

These proposals are one or two person, action item-size *Small Now’sSM* or larger team project-size *Big Now’sSM*. They are ranked by value to the process’s customers, its use of cash, and its PCG impacts. Small/Big Now’s that cannot be assigned and scheduled within 90 days are flagged as *Not Yet’sSM*. The host brings any *Not Yet’sSM* they cannot resource themselves to the *Sponsor* for additional resources.

This initial list launches a continuous improvement (*kaizen*) team if leadership commits to periodic refreshing.

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1 Your Process Triage® facilitator has specific details about crafting a Process Capability Statement
The Doctrine of Completed Staff Work is a foundational theory behind the triaging protocol. It is the reason front-line performers/experts must constitute the triage team and hosts / sponsors may only ask clarifying questions during the triage workshop.

1. The doctrine of “completed staff work” will be the doctrine of this office.

2. “Completed Staff Work” is the study of a problem, and presentation of a solution, by a staff officer, in such form that all that remains to be done on the part of the head of the staff division, or the commander, is to indicate his approval or disapproval of the completed action. The words “completed staff action” are emphasized because the more difficult the problem is the more the tendency is to present the problem to the chief in piece-meal fashion. It is your duty as a staff officer to work out the details. You should not consult your chief in the determination of those details, no matter how perplexing they may be. You may and should consult other staff officers. The product, whether it involves the pronouncement of a new policy or affect an established one, should when presented to the chief for approval or disapproval, be worked out in finished form.

3. The impulse which often comes to the inexperienced staff officer to ask the chief what to do, recurs more often when the problem is difficult. It is accompanied by a feeling of mental frustration. It is so easy to ask the chief what to do, and it appears so easy if you do not know your job. It is your job to advise your chief what he ought to do, not to ask him what you ought to do. He needs your answers, not questions. Your job is to study, write, restudy and rewrite until you have evolved a single proposed action – the best one of all you have considered. Your chief merely approves or disapproves.

4. Do not worry your chief with long explanations and memoranda. Writing a memorandum to your chief does not constitute completed staff work, but writing a memorandum for your chief to send to someone else does. Your view should be placed before him in finished form so that he can make them his views by simply signing his name. In most instances, completed staff work results in a single document prepared for the signature of the chief, without accompanying comment. If the proper result is reached, the chief will usually recognize it at once. If he wants comment or explanation, he will ask for it.

5. The theory of completed staff work does not preclude a “rough draft”, but the rough draft must not be a half-baked idea. It must be completed in every respect except that it lacks the requisite number of copies and need not be neat. But a rough draft must not be used as an excuse for shifting to the chief the burden of formulating the action.

6. The “completed staff work” theory may result in more work for the staff officer, but it results in more freedom for the chief. This is as it should be. Further, it accomplishes two things:
   - The chief is protected from half-baked ideas, voluminous memoranda, and immature oral presentations
   - The staff officer who has a real idea to sell is enabled more readily to find a market.

7. When you have finished your “completed staff work” the final test is this: If you were the chief would you be willing to sign the paper you have prepared, and stake your professional reputation on its being right? If the answer is negative, take it back and work it over because it is not yet “completed staff work.”

The following memorandum has been reproduced countless times by military and civilian organizations since World War II and has become a widely accepted definition of what effective staff members do. The original source of the memorandum is unclear. Some reports indicate that the memo was issued in January 1942 by the Provost Marshal General, U.S. Army. It has also been attributed to Brigadier G.E.R. Smith, a member of the Royal Canadian Army, who released it in 1943, while he was serving as Deputy Director of Supplies and Transport, First Canadian Army.
Why Process Triage?

The reasons are compelling

Triaging develops your continuous improvement culture. A continuously learning and improving organization excels in two things; top-down direction that focuses on both the customer experience and resource stewardship and tactically savvy improvements driven by front-line experts from the bottoms-up.

Triaging syncs top-down strategy with bottoms-up execution quickly and thoroughly. A day of triaging yields 90 days of focused business and process improvement.

Triaging focuses great teams. Triaging is a superb team launching tool. Triaging’s highly interactive, collaborative nature requires fact based, business-focused conversations. Newly introduced team members reveal their expertise that, in turn, builds respectful professional relationships. The objective facilitator keeps conversations focused on the task and hand.

Triaging finds workable improvements. When your front-line high performers understand your overall strategy, they’ll make improvement suggestions if they know you’ll resource them. Since the triage protocol begins with your strategic intent, every improvement action item or project proposal has strategic fit.

Triaging outlines your business case for more resources. Smaller improvements and the plans for bigger improvements that cannot be delivered in 90 days are called Not Yet’s. Each Not Yet includes a level-of-effort estimate. Considered together, the stack of Not Yet’s feed your business case for additional resources that, if acquired and allocated, accelerate progress toward your objectives. Skip-level senior executives who observe the second half of the triage are pre-sold on such business cases.*

Triaging exposes potential leaders. Great executives, among many skills, are especially good at recognizing talent. Triaging exposes highly imaginative individual contributors who must persuade their peers to prioritize their improvement proposals. Executive sponsors often clear their calendar to observe the second half of triage workshops to both find these individuals and sharpen their own situational awareness.

Triaging improves situational awareness. High performing employees are willing to “fall on their swords” over principles or proposals they deeply care about. Yet sometimes their passion is misdirected because they lack the big picture. Process triaging broadens their perspectives and clarifies what’s most important to fix.

Triaging fosters good staff work. Triaging is philosophically grounded in The Doctrine of Completed Staff Work. The triage protocol begins with the host’s strategic direction and limits its scope to what the expert team can influence. These recommendations are based upon expert knowledge, and present clear, actionable courses of action.

These focus points ensures your success. Your facilitator welcomes your time to discuss them further as needed, and looks to you to perform these points to the best of your ability.

* The record for pre-sold Not Yet’s is $250K, pending a complete business case. The senior executive released $125K for these Not Yet’s with just the triage findings. Both the team host and team were experienced triagers.
Decide how triaging workshops support your management philosophy. It easy and almost trite to say you are committed to continuously improving your business. Who isn’t? But actually empowering your front-line experts, who perform your critical processes, to offer and lead improvement changes with your money requires a lot of mutual respect and trust. That respect and trust comes from a shared situational awareness of how a critical process is performing relative to your business objectives. Process Triaging delivers that situational awareness and presents your expert team an opportunity to show your where and why the process’s design or execution must change, including the size and priority of such changes. If you want tactical improvements to be identified and driven with bottoms-up buy-in, the Process Triage approach is a perfect fit for you.

Decide how much authority you want to delegate to the triage team. The Process Triage protocol requires you delegate some things. By simply selecting a triage team member, you grant them the privilege of defining what the process is for triaging purposes, including describing its performance capabilities. You grant them the gravitas to say what what’s hindering your objectives in pointing out points-of-pain. You trust them with sizing and scoping the action items and projects that will remove these point-of-pain. You’re trusting their judgment when they rank and prioritize these proposals. Executive Sponsors understand this and typically welcome this sort of empowerment.

When it comes to assigning and scheduling these proposals for completion within the next 90-days however, they are now allocating resources. That resource allocation is a different kind of delegation that takes on management responsibility. You have three choices:

- **Low delegation**: Do not attempt to assign or schedule the ranked proposals. As long as you support their highest priority proposals, or explain why you cannot in compelling, fact-based terms, but do support others, your triaging will serve you well.

- **Medium delegation**: Allow them to assign and schedule the ranked proposals, stipulating will receive these as a recommendation - good staff work, but are not bound by them. You will certainly support what fits in your portfolio of responsibilities and discretionary budgets.

- **High Delegation**: Have them assign and schedule the triaged proposals, grant them budget guidance and assign the necessary staff work time to refine and confirm the triage ranking and
assignment results. Approve their completed staff worked proposals. This is essentially empowering a self-managed team.

**Reserve enough budget to support the triage results.** The Process Triage workshop delivers a prioritized stack improvement proposals in two sizes; a one or two person, action-item size *Small Now* and a larger team effort, project-sized *Big Now*. They are forced ranked by their highest value to your customer, your financial bottom line, and your personally stated strategic direction.

Regardless of whether or not you let them assign and schedule the proposals (see the previous discussion point), it is absolutely essential you back their highest value proposals with real, budgeted resources. The risk of conducting a triage session that requests they tell you what to focus on and then you not to support it will destroy the team’s willingness to offer suggestions in the future.

**Decide how you’ll use Small & Big Now assignments for staff development.** The prioritized list of improvement proposals are excellent task assignments for developing your staff. Consider pairing up a younger high-potential employee with a seasoned “triaging-grade” expert to grow their skills and honor your triage team members.

**Always observe the second half of triage sessions.** Assuming you have a subordinate serving as the triage session’s *Process Triage Host*, this host will come to you to resources any opportunities the triagers don’t have bandwidth for. You’ll understand the context when your host delivers a completed business case.

A process triage session is a skip-level team meeting that is entirely focused on understanding how to implement your objectives. The triage’s first half does not have any deliverables you could not be briefed on by the team leader in much less time. The second-half work of identifying points-of-pain and sizing their solutions sharpens your situational awareness regarding people, process and technologies.

**Schedule follow-up progress reviews.** The more you pay attention to triaged proposals, the more devoted your triage teams will be to delivering your objectives. When they see you’re maintaining your focus, they’ll maintain theirs.

**Publicly announce triage-driven resource allocations or policy changes.** When your triage team sees you publically support their triaged recommendations with real budgets or policy changes, you solidify their confidence and professional trust in you. By doing so you demonstrated your confidence in them to take fact-based risks on your compass heading.

**Publicly celebrate triaged proposal accomplishments.** When you celebrate a proposed improvement’s completion that came the triage session, the informal leaders who comprised your triage team will, themselves, gain more respect and confidence and deliver higher levels of performance.

Process Triaging does not fix things, it finds what to fix next. It improves situational awareness for a moment - which is good, but its value is how it focuses your team to fix the right thing first.
The Process Triage Host

How to get the most from your workshop

**Define your Process Capability Goal**

Your purpose and objective as your Executive Sponsor's Triage Host is to define the triage's focus with your Process Capability Goal -- the CPG.

Mid-point in the triage, you'll personally deliver your PSG to your team. This will serve as their focus for the remaining triage tasks including Points-of-Pain that hinder your goal and the Small Nows™ and Big Nows™ that remedy the pain points to achieve it.

Therefore, your CPG transforms your sponsor’s strategic objectives into operational reality, from an aspirational direction to quantifiable action.

Your goal describes what the process can sustain, in terms of speed, cost, quality, and/or volume (cycles) by a future date. It is a crisp, clean WHAT statement, unqualified by tactics or methods suggesting HOW the goal shall be reached. How the goal is reached is delegated to your triage team members and to their creative collaboration.

Your facilitator is well qualified to assist you with crafting your CPG.

**Select great triage team members.**

The quality of the triage depends primarily on the quality of your triagers. Pick your ‘A’ Team that consists of your most knowledgeable performers. They need to be hands-on familiar with the process and its infrastructure on a daily basis. They must know the details of how work gets done with the tools and talent available so they can anticipate your CPG’s impacts and opportunities.

If you must choose between an expert individual contributor and a manager who also works in the process, favor the individual contributor. There are other post-triage activities you’ll want the manager to address.

Make sure every significant activity and deliverable within the process is represented by at least one content expert and one infrastructure expert. The same expert often wears both hats. Sometimes this knowledge takes two people, such as a computer program user (not the program’s design expert) and an expert from the IT staff. Typically one content expert covers several steps or deliverables in the process.

For 1-day triages (the norm), limit your triagers to no more than 10 to 12. Since each triager merits the time to share their thinking, more than a dozen slows the triage down too much. If the process is that complex, better to divide it up into two sessions.
Observe the second half of the triage.

After you and your sponsor give welcome and opening remarks, there is no need to observe the morning work unless you need to participate as a triager (on the front row) to map the process. The team will not need your assistance as long as your experts cover the process end-to-end.

After you stand tall and declare your CPG, the team identifies the process’s points-of-pain that hinder your - now their goal. Each pain point will be proofed to make sure it’s removal advances your goal, so listening to the nominator’s justification improves your situational awareness.

Because points-of-pain are the top three or four from each team member’s viewpoint, duplicates appear. These clusters generate additional discussions worth listening to. Your presence reinforces that you’re actively listening to their insights and perspectives.

After all the pain points are proofed, your team brainstorms the pain’s removal by a Small Now action item-size task or a Big Now project-size proposal - short-handed to Smalls ‘n Bigs. These are two of the three triage sorting categories. Your situational awareness increases in detail as you watch (not assist!) your team nominate these solutions.

Watch how they interact, debate, demonstrate expertise, and achieve consensus. You’ll have good development topics for your 1:1 mentoring time later.

Decide beforehand how you will handle the Small / Big Now’s assignments.

The last triage step is to schedule and assign the Small NowSM action item or plan (only the plan!) the Big NowSM projects. These are to be completed within 90 days at current workloads. Any that cannot be scheduled are flagged as Not YetSM (the third triage category). Here are your two options:

1. **The Team’s scheduling and assignments are FINAL ENOUGH.**

   This is affirming or declaring your triage team is, for all intents and purposes, a self-managed team - a kaizen team. They have the skills, resources and authority to deliver any Small / Big NowSM they schedule and assign. Your management responsibility is to accept their triage findings as “completed staff work.”

2. **The Team’s scheduling and Assignments are NOT FINAL**

   This affirms their rankings, scheduling, and assignments are their recommendation, which you will respectfully consider and modify based on everything else on your plate - and theirs!

Complete the Workshop Readiness Checklist (WRC).

Your Process Triage® facilitator created a cloud folder (we use DropBox®) named ‘PT_DROP_[Your company name]’ and shared it with you. In that folder is a Workshop Readiness Checklist - or WRC.

This checklist has certain Critical Entrance Criteria that must be met before we can comfortably commit the facilitator. There’s nothing difficult to it, and we keep it simple - so what’s on the checklist is absolutely necessary.

We look forward to working with you and joining your efforts toward binding your team’s performance to your vision.

The Process Triage® team.
The Process Triage Team Member

How to get the most from your workshop

Your invitation is a compliment from the host. Your workshop host has recognized you as a process content subject matter expert. Your host not only welcomes, but depends upon your insights the process triage offers. Your judgments about what process changes will be needed, when they’re needed must guide the innovations necessary to meet business objectives. Expect a challenging and rewarding day.

Your expert knowledge is enough. The Process Triage protocol requires a triage team that has hands-on knowledge based on daily integrations in the process. Your awareness of what the process comprises - its design, rules, tools and technologies, and people skills must be practical, pragmatic, and fact-based. Exactly what your already know.

Understand the purpose of process triaging. The most important process triage result, from an expert team member’s view point is that it enables you, who must live with process changes, to define and drive them. It guides your leadership’s resource allocation so you get what you need to achieve the objectives they set, tempered by the situational awareness your triage team provides through the triage protocol. Your team will “see the whole elephant” and select the best improvements.

Identify Points-of-Pain with Measurements. The host will review your Process Capability Goal right after lunch (typically). Naturally, you’ll recognize immediately where something measurable is not performing or will not perform to the goal. These are called points-of-pain. Describe these pain points in as specific, measurable terms as reasonable, avoiding generalizations. For example, the directional but vague, “Too many bad addresses.” Is a less actionable point-of-pain than the more specific, “34% of the addresses have street address errors.” Your estimates will be accurate enough for triaging.

You cannot fail. The Process Triage® protocol has been field tested and continuously improved through a hundreds of triage sessions with thousands of expert participants representing almost every type of business process, within all sizes of enterprises, from start-ups to the largest organizations.

The protocol is a tool to reuse. The process triage protocol is built upon the behavior norms of high performance teams. Use the protocol in your own staff work to achieve your own objectives.

Thank you for your participation.
The Process Triage® Team.
The Process Triage® Protocol

The triage workshop agenda consists of the Process Triage® Protocol, bookended by kick-off remarks and introductions at the start and a participant experience survey and closing remarks afterward.

A ten to fifteen minute break will be provided in the morning and afternoon. Lunch is provided.

The Process Triage® facilitator will lead you through the protocol and ensure each step is sufficiently complete. It’s a day of intense interaction, creativity, critical thinking and learning.

Kick off remarks and introductions – 8:05 typically

- Action>Result<sup>SM</sup> Mapping
- ± 2.5 hours
- 8:15 start

- 15 Minute Break

- Triage Exams
- ± 45 minutes

- Lunch
- 30 minute lunch
- 11:45-12:15 typically

- Host’s Goals
- ±15 minutes

- Points of Pain
- ±1 hour

- 15 Minute Break

- Small / Big Now’s<sup>SM</sup>
- ± 2.5 hours

- Assignments & Not Yet’s<sup>SM</sup>
- ±30 minutes

- Closing Remarks & Experience Survey
- 15 minutes
- 5:00 end typically; may go to 6:00

Triaging requires working with a purpose and attentive focus. Please set your mobile phones to vibrate and set laptops aside unless one needs to look up a reference resource.

Please feel free to step out of the room to answer unavoidable phone calls or text back with a time you can respond.
### Points of Pain (Continued)

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<thead>
<tr>
<th>Action #</th>
<th>Points of Pain</th>
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<tbody>
<tr>
<td>210</td>
<td>Outbound call # (attempts) 30% short of goal</td>
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#### Function, Organization or Process Focus

Enforce outbound sales call journaling, analyze results, implement lessons learned.

**Deliverable** (Resolves Pain: Analyze, Design, Train, Enforce...“x”)

**↑ Outbound sales close % of attempts.**

**Progress or Success Measurement** (↑↓ What?)

**All outbound sales staff & managers**

Key Resources, Experts, or Technologies needed

75% of the time don’t know why outbound sales do not close.

**Point of Pain** (A measured observation inhibiting the goal)

<table>
<thead>
<tr>
<th>Action #</th>
<th>210</th>
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### Training refresh 1 hour, sustaining weekly checks 1 hr./week + follow through.

**Small Now℠ Effort to Finish | Big Now℠ Effort to Plan** (Time)

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**Host / Process Manager Notes** (Speed, Cost, Quality, Rework, Volume, etc.)

Enforcing outbound sales journal reviews will help us better understand what is driven by poor leads (from Marketing) or poor salesmanship.

Also look for competitor positioning.

J.T. (Host)

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**Sponsor (C-Level) Notes** (Vision, Business Model, Staffing & Resources)

Is our outbound sales model the right model?

What are Sally (Marketing manager) and our advertising team doing to verify lead list quality -- if it’s a quality problem?

F.D. (Sponsor)
1. **Analyze your triage results.** The triage nominated, prioritized, and (if it was in scope) assigned and scheduled Small NowSM action items Big NowSM project proposals. Signed-up for Small Now’sSM are to be completed entirely while only the project plan is due on assigned Big Now’sSM. Unassigned or unscheduled Small / Big Now’sSM are set aside as Not Yet’sSM pending resources or predecessor work.

   *Your facilitator typically moderates a formal review at this point. Each TEAM TRIAGE CARD is reviewed with the published triage map set.*

   Since every Small/Big NowSM advances the team’s progress toward their **Process Capability Goal**, and resources are limited (typically), support the highest ranked efforts first.

2. **Monitor Small/Big NowSM Progress**

   After the leadership team is satisfied the Small/Big Now’sSM are assigned appropriately and the assignee’s manager has declared their leadership mode, monitor their progress closely.

   It may be necessary to flip an assigned item to Not YetSM as sometimes the degree of difficulty is underestimated during the triage.

3. **Complete the Big NowSM Plans.**

   The Big NowSM project plans should have sufficient scope and detail to approve, disapprove, or wait list them. Highly ranked projects merit strongest efforts to support.

4. **Hosts: Submit your 90+ Day Improvement Plan**

   Generally speaking, the first three steps are host-level staff work. After the host has exhausted all his or her resourcing options, the remaining Not Yet’sSM are resource requests to the Sponsor. If the organization follows *The Doctrine of Completed Staff Work*, the host will include a resource request ready for approval. This is why the Sponsor attends as much as the afternoon session as possible, as he or she will anticipate the request.

5. **Sponsor: Review the Host’s 90+ Day Plan.**

   The Sponsor reviews the Host’s improvement plan and timeline and either asks for revisions or approves it, including some or all the additional resource requests.
6. Acquire New / Additional Resources (if approved).

The Sponsor and Host acquire the additional resources approved by the sponsor, typically temporary staffing to work off a back-log, and permanent staffing to address the new run rate.

7. Monitor Improvement Progress

This is similar to Step 2. This effort now includes all the Big Now℠ projects in process.

8. Celebrate Completed Progress.

This is a big deal. When a triage team experiences the affirmation and appreciation of completed improvements, any doubts about follow-through one the triage day are dispelled. We recommend these celebrations not be monetary compensation as to continuously improve one’s process is normal work. We suggest a party or team celebration.


The last step in implementing a continuous improvement culture is to update the Small/Big Now℠ stack with a half-day refresh triage if a kaizen team was not commissioned.

The triaged process’s Base Map is reusable as long as actions (arrows) or results (circles) are unchanged.

“Rinse and repeat” noting the experienced team will typically nominate more Small Now℠ going forward as they are easier to fund.

The Process Triage Team
info@processtriage.com
(913) 269-3410
Launch and focus major business process changes with Process Triage® workshops.

Process triaging launches and complements other business process change methodologies. Process Triaging finds what to fix first, then next, and so on. Your business process change leaders will apply the appropriate methodology and project management approach based on the triage results.

<table>
<thead>
<tr>
<th>Process Triage® Workshop (1 day event)</th>
<th>The triage workshop identifies process experts’ pain points related to the leader’s specific business objectives. They nominate, prioritize, and assign action items and projects for immediate execution with leader collaboration.</th>
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<tbody>
<tr>
<td>90 Days of assigned action items and projects</td>
<td>Assigned and delayed action items and projects will launch and/or accelerate these methodologies.</td>
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<td>DESIGN FOR 6σ</td>
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WEEK(S) to MONTH(S) depending upon scope and urgency of improvement goals.
Process Triage Venue Requirements

The room set-up is simple

Select a comfortable, big enough room with tables, away from daily work areas. The team will spend about eight hours in the triage session, not counting lunch. Comfortable chairs are a plus. The facilitator provides a thin, portable foam-core wall that leans against the wall the team will face. The facilitator will build the ACTION>RESULT™ Map for triaging on this portable wall with the team. The portable wall will not harm the room’s wall surface.

The room should not be convenient for team members to return to their work location if possible. Breaks are provided to check e-mails and make phone calls.

One flip chart on a stand will do. The facilitator will provide a portable LCD projector to present instructions about the triage protocol. Team members are welcome to share the projector for process-related information. A free-standing projector screen is nice to have if convenient, otherwise we’ll use what’s available (a wall or built-in screen).

Healthy snacks and beverages are welcome. Snacks and beverages are always welcome as the workshop is a roll-up-your-sleeves working session.
This checklist presents our best practice for planning your Process Triage® workshop. First complete the ‘Go’ criteria (top of page 2), then the Workshop Launch Check List and this front page. Review the Post-Triage Task List to prepare for after-the-triage activities.

**CLIENT**

*Acme Staffing, LLC*

**Company Name**

3002 Washington Street

**Address**

Santa Rosa, CA 95401

**City**

**State / Province**

**Postal Code**

www.acmestaffing.com

**Home Page (URL)**

**SPONSORS**

*John Adams*

**Sponsor**

502-555-2301 / jadams@acmestaffing.com

**Sponsor Contact Phone / Email**

N/A

**Co-Sponsor (optional)**

N/A / N/A

**Co-Sponsor Contact Phone / Email**

**HOSTS**

*David Jefferson*

**Host**

502-555-2305 / djefferson@acmestaffing.com

**Host Contact Phone / Email**

*Susan Washington*

**Co-Host (optional)**

502-555-2229 / swashington@admestaffing.com

**Co-Host Contact Phone / E-mail**

**ADMINISTRATIVE SUPPORT** *(If Applicable)*

*Terri Hamilton*

**Administrative Support Contact**

502-555-2392 / thamilton@admestaffing.com

**Co-Host Contact Phone / E-mail**

**PROCESS TRIAGE® AFFILIATE** *(If Applicable)*

N/A

**Affiliate Name**

N/A

**Affiliate Account Manager**

N/A / N/A

**Contact Phone / Email**

N/A

**Affiliate Consultant**

N/A / N/A

**Contact Phone / Email**

**WORKSHOP**

**Wednesday, October 9, 2013**

**Workshop Start Date**

**Leads to Cash**

**Triaged Process Name**

**Left Boundary**

Client / Candidate contact initiated (lead)

**Right Boundary**

Final Payment received (after employee 6-month warranty period).

**Reason for Triaging**

Grow business (EBITDA) 5% semi-annual growth, sustained; execute franchising offices in 10 MSA.

**Desired Outcomes**

Understand what to focus on next, in terms of a scalable, repeatable, affordable volume increase; what breaks when we increase volume?

**WORKSHOP VENUE**

*Charles Schultz Skating Center*

**Venue Name**

302

**Conference Room Name/Number**

2301 Hardies Ln

**Address**

Santa Rosa, CA 95406

**City, State/Province, Postal Code**

**Venue Contact Phone**

**FACILITATORS**

*Joseph Rosenberger / 1*

**Lead Facilitator / Certification #**

913-269-341- / rosey@processtraige.com

**Contact Phone / Email**

*Adelynn Jenkins*

**Assistant Facilitator (Optional)**

502-555=3928 / ajenkins@processtrriage.com

**Contact Phone / Email**

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## WORKSHOP “GO” CRITERIA

<table>
<thead>
<tr>
<th>Sponsor (Client)</th>
<th>Host (Client)</th>
<th>Process Triage® Facilitator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. ☐ Review Workshop ‘GO’ Criteria</td>
<td>☐ Review Workshop ‘GO’ Criteria (with Sponsor, if selected)</td>
<td>☐ Brief Workshop ‘Go’ Criteria</td>
</tr>
<tr>
<td>2. ☐ Review <a href="#">Process Triage – The Executive Sponsor</a> overview (click on link)</td>
<td></td>
<td>☐ Consult w/sponsor &amp; host on triaging scope of work.</td>
</tr>
<tr>
<td>3. ☐ Select host &amp; delegate execution</td>
<td>☐ Review <a href="#">The Process Triage Host overview</a> (Click on link)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>☐ Verify Workshop Launch Check List items (below) can be satisfied.</td>
</tr>
<tr>
<td>4. ☐ Review / Approve Workshop plan</td>
<td>☐ Present workshop plan</td>
<td>☐ Consult as needed</td>
</tr>
</tbody>
</table>

## WORKSHOP LAUNCH CHECK LIST

<table>
<thead>
<tr>
<th>Host Coordinator</th>
<th>Process Triage® Facilitator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. ☐ Issue <strong>Save the Date</strong> notice to participants. Reserve Sponsor’s time for opening remarks and day-of observation (typically 2:00 pm to close.)</td>
<td>☐ Reserve the venue (specific set-up requirements <a href="#">here</a>)</td>
</tr>
<tr>
<td>2. ☐ Issue <a href="#">Process Triage® Workshop Invitations</a> (copy-past-edit boilerplate text <a href="#">here</a>)</td>
<td>☐ Reserve catering (if required)</td>
</tr>
<tr>
<td>☐ Draft &amp; review <a href="#">Process Capability Goal (CPG)</a> statement w/facilitator (sample <a href="#">here</a>)</td>
<td>☐ Assist w/travel arrangements (if required)</td>
</tr>
<tr>
<td>☐ Draft &amp; review <a href="#">Process Capability Goal (CPG)</a> statement w/facilitator (sample <a href="#">here</a>)</td>
<td>☐ Register workshop</td>
</tr>
<tr>
<td>3. ☐ Present &amp; finalize <strong>CPG</strong> with Sponsor</td>
<td>☐ Set-up / share workshop files folder</td>
</tr>
<tr>
<td>4. ☐ Draft &amp; review sponsor &amp; host opening remarks w/facilitator</td>
<td>☐ Arrange travel (if required)</td>
</tr>
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<td></td>
<td>☐ Inspect venue</td>
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<tr>
<td></td>
<td>☐ Order mapping wall materials (if required)</td>
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<td></td>
<td>☐ Coordinate assistant facilitator support &amp; travel (if required)</td>
</tr>
</tbody>
</table>
# POST- WORKSHOP TASK LIST

<table>
<thead>
<tr>
<th>Sponsor (Client)</th>
<th>Host (Client)</th>
<th>Process Triage® Facilitator</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>☐ Review post-triage next steps and improvement (Kaizen) team commissioning.</td>
<td>☐ Review post-triage next steps / Improvement (Kaizen) Team commissioning.</td>
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<td></td>
<td>☐ Review triage cards deck, schedule leader’s review for Select Leader’s Review Meeting Date/Time</td>
<td>☐ Present Workshop Results</td>
</tr>
</tbody>
</table>

| 2 | ☐ Review Workshop Results; issue host guidance as needed. | ☐ Present Workshop Results | ☐ Assist Host with results presentation |
| 3 | ☐ Hold Leaders’ Review, finalize Small / Big Now’sSM assignments and Not Yet’sSM selections | ☐ finalize Action>ResultSM Map Set, print and delivery hard copies. | ☐ Submit Invoice |
| | ☐ Launch / reset Kaizen team if desired. | | |
| | ☐ Present 90-day Plan & Not Yet’sSM Funding Request | | |
| 4 | ☐ Evaluate Host’s 90-day Plan and Not Yet’sSM Funding; allocate resources; monitor results. | ☐ Monitor Small / Big Now’sSM progress | ☐ Deliver post-triage Kaizen team development topics (if contracted). |
| | | | |

## NOTES

Click here to add texts for miscellaneous notes, itineraries, special instructions, etc.

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