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 *Process Triage®* 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.
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 ensure 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.

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* 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.

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Know your destination. Your first responsibility is to define and articulate your process’s role in your overall business plan and objectives.

At the mid-point of the triage, after your team has completed the wall work (mapped and marked it up with performance notes) you’ll personally review your destination with them*, described in terms of what the process must be capable of doing by a certain date.

Typically this goal is expressed as a measurable objective in speed, a financial or market size metric, a product or service quality level, or volume of work. The familiar S.M.A.R.T. format is a good model for expressing objectives.

Select the best triage team members. 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 objectives’ impacts and opportunities.

Make sure every significant work product or 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.

Select the team leader. The team leader is your first among equals team member; not necessarily a manager or supervisor unless they are this process’s expert in their own right. Consider appointing a high-potential junior team member as a professional development exercise.

The Team Leader is responsible for the Workshop Readiness Checklist (WRC). They are your triage workshop project manager, by any other name. The WRC lists the entrance criteria that must be met to have a successful triage experience. Review it with them and assist as needed.

The team leader represents your interests when you’re not in the room. He/she assists the facilitator by deciding whether or not a discussion topic should be allowed to continue or parked for later. They help with other team-related requests the facilitator may require. When it is time to rank and prioritize the Small Now’s and Big Now’s (action items and projects that address pain points), your team leader may be asked to break tie votes.

* We recommend you do not delegate presenting your objectives. If you are unable to attend in person, we’ll put you on a speaker phone.
Observe the second half of the triage if at all possible. After you stand tall and declare your goals and objectives with the clarity and panache, the team identifies points-of-pain the process has now or will have as they pursue your -- now their goal. Each pain point will be proofed to make sure it’s relevant, 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 cluster on the map. 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, each one is targeted for 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 make these assignments.

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

Tailor the ranking criteria for the Smalls and Bigs. The Small Now action item and Big Now project proposal worksheets are spread out side-by-side and then force-ranked (no ties) three times. The first ranking pass selects which Small or Big matters most to your customer - called its Moment of Truth Value. The second pass ranks them by the impact to your bottom line, called Use of Cash Value. These ranking criteria also work well in more specific terms. For example, the Use of Cash might be dialed in to Use of Labor Resources if labor is the primary way the process consumes cash. As long as the first ranking reflects value to your consumer and the second reflect value to the investor, the triage protocol works.

The third and final ranking pass prioritizes on your objective - so that may not change.

Decide beforehand how you will handle the scheduling and assignments of Smalls and Bigs. The last triage protocol step is to schedule and assign the Small Now action item or the planning (only the plan!) for Big Now projects, if they can be completed within 90 days at current workloads. Any Small or Big that cannot be scheduled is flagged a Not Yet (the third triage category). You’ll want the team leader to emphasize your expectations if you are not present.

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. They have the skills, resources and authority to deliver any Small or Big Now they schedule and assign. Your management responsibility is to accept their triage findings as completed and approved staff work.

2. **The Team’s scheduling and Assignments are NOT FINAL**
   
   This affirms their rankings, scheduling, and assignments are their recommendation in the spirit and fact of completed staff work you will respectfully consider and modify based on everything else on your plate - and theirs!

These six 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 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 you 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’s business objectives mid-way through the triage. You’ll then offer you’re a few observations where you see or expect to see the process struggle. 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

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<tr>
<th>Step</th>
<th>Duration</th>
<th>Notes</th>
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<tr>
<td>Map</td>
<td>± 1.5 hours</td>
<td>(followed by a break)</td>
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<tr>
<td>Exams</td>
<td>± 1.5 hours</td>
<td>(followed by a break or lunch)</td>
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<td>Goals</td>
<td>15 minutes</td>
<td>(typically after lunch)</td>
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<td>Pain Points</td>
<td>± 1 hour</td>
<td>(followed by a break)</td>
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<td>Deliverables</td>
<td>± 1.5 hours</td>
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<td>Schedules</td>
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Experience survey and closing remarks

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.
Workshops: Latest 12 Date As of December 4, 2013

These anonymous thoughts and opinions about our Process Triage℠ workshop experience drives our continuous improvement efforts and provides candid feedback to your workshop’s sponsor.

Survey Sample Size: 84 triagers

Question

Was this Process Triage℠ Workshop worth your and your sponsor’s investment compared to other work in your queue?

Circle your score:

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<tr>
<td>Strongly Disagree</td>
<td>Indifferent</td>
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Did or will the workshop improve team member coordination?

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How confident are that your leadership team will follow through with allocating the resources accomplish the Small Now℠ and Big Now℠?

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<tr>
<td>Strongly Not Confident</td>
<td>Undecided</td>
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Were you satisfied with your Process Triage™ facilitator’s performance?

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<td>Unsatisfied</td>
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Were you satisfied with the workshop’s administration? (Location, facilities, snacks & food, admin support, etc.).

Circle your score:

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Generally speaking, participants indicated the triage workshop was well worth their time compared to whatever else was in the queue and were delighted with improved teamwork as a result. Subject matter experts, being the most senior and savvy about how hard it is to stay focused, rightly have a wait and see attitude regarding executive sponsor and host follow through. The most financial commitment from a sponsor at the close of a workshop (in this sample) was $200K for two job positions needed to resolve a #1 Big Now℠ project. This level of sponsorship is not unusual given the recommendations’ quality driven by the triage protocol. The facilitator scores exceptionally well.

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Process Triage® Workshop Readiness Checklist

This checklist presents our best practice for planning your Process Triage workshop. We can assign and schedule our facilitator when Critical Entrance Criteria (Page 2) are reasonably met.

Host Organization: Johnson Staffing Solutions
Focus Area / Process: Technical / IT Staffing Fulfillment
Proposed Date: 05/03/2012
Location: Johnson Staffing office, Room 201 (Training Room)
Scheduled Date: 05/10/2012

Focus Area / Process Scope

Organization: Technical / IT Staffing Group
Process Trigger(s): Staffing request received.
Final Deliverable or Result:
- Candidate satisfaction verified (post warranty period)
- Client satisfaction verified (post warranty period)
- Fulfillment process performance reported
Triage Motives & Purpose: Grow 3X by June 1, 2013

Triage Team Leadership

Executive Sponsor: Sam Jarvis
Triage Host: Vivian Wilson
Triage Team Leader: T’Shara Jackson
Triage Facilitator: Joseph Rosenberger
Admin. Coordinator: Julie Frost
Scribe (optional): NA

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Critical Entrance Criteria

The following items must be completed before the Process Triage® Facilitator can be committed to the workshop:

1. **Executive sponsor** has read the Process Triage Workshop Guide regarding requirements, roles & responsibilities? ☑

2. **Workshop Host** Assigned and read "The Process Triage Host" hand-out? ☑

3. Host’s Process Objectives Defined? ☑

4. **Triage Team Leader** Assigned and read the “Process Triage Team Leader” hand-out? ☑

5. Facilitator Reserved? ☑

6. Host, Team Leader and Facilitator review / complete this readiness checklist. ☑

7. **Process Boundaries Defined?** ☑

8. **Team Members** assigned and "The Process Triage Team Member" hand-out reviewed by each member? ☑

9. **Workshop venue** selected? ☑

10. Workshop Location Inspected by the facilitator? ☑

11. Drop Box / File Sharing Established? ☑

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**Administrative Notes**

- Snacks and Refreshments? ☑
- Internet Connectivity? ☑

Additional coordination notes:

Holllis Thompson, Director HR will attend as an observer.

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**Contact Information**

**Workshop Host’s Team Leader**  
(Workshop Project Manager)  
T'Shara Jackson  
555-2201  
T.Jackson@JSS.com

**Professional Services Agency Account Manager** (If applicable)  
NA

**Process Triage Facilitator**  
Joseph (Rosey) Rosenberger  
913-269-3410  
rosey@processtriage.com

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Process Triage LLC  
Attn: Workshop Support  
Office: 913-269-3410  
Process Triage LLC

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