



My Nintex Workflow Picks Up My Dry Cleaning

(not really... but if I wanted it to, it would)

About the Speaker

Tami Buckman

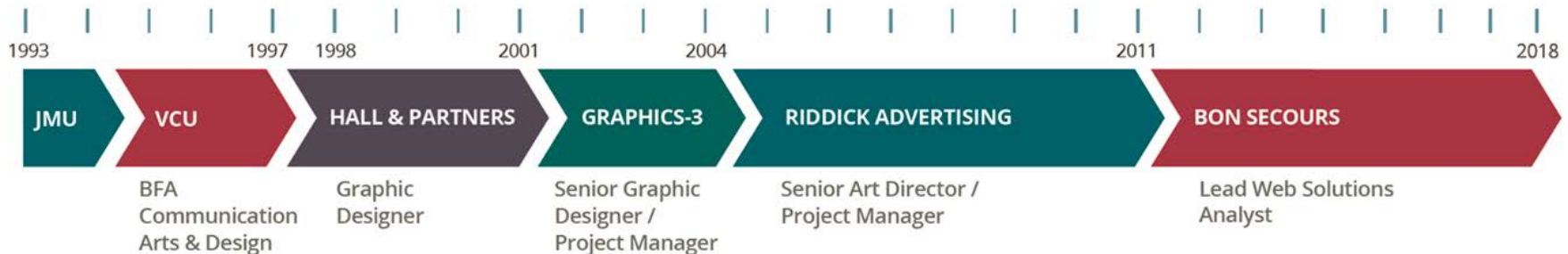
Midlothian VIRGINIA

tamib.site90.com

UX Design

Print Design and Branding

Project Management



Lead Web Solutions Analyst
BON SECOURS HEALTH SYSTEM

About Bon Secours

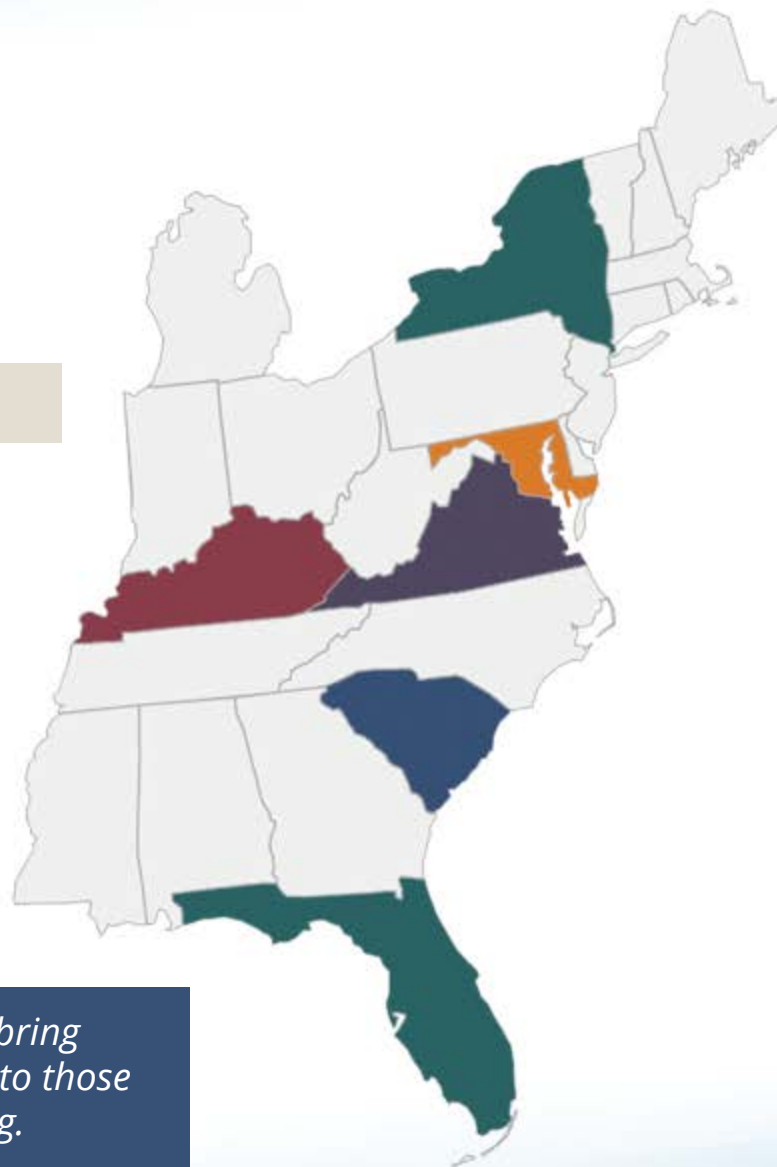
\$3.5 billion not-for-profit Catholic health system headquartered in Marriottsville, Maryland

23,000 employees

6 states, primarily on the east coast

- 19 acute-care hospitals
- 1 psychiatric hospital
- 5 nursing care facilities
- 4 assisted living facilities
- 14 home care, hospice

The Mission of Bon Secours Health System is to bring compassion to health care and to be good help to those in need, especially those who are poor and dying.



About Bon Secours

Bon Secours Virginia

RICHMOND

St. Mary's Hospital

Richmond Community Hospital

MECHANICSVILLE

Memorial Regional

Medical Center

MIDLOTHIAN

St. Francis Medical Center

NORFOLK

DePaul Medical Center

PORTSMOUTH

Maryview Medical Center

NEWPORT NEWS

Mary Immaculate Hospital



Questions for the Audience

How formal/mature is your company's project management process?

Do you have a change management process to ensure users support the new tools?

Solution Lifecycle



Planning

Development

Promotion



Solution Lifecycle



Planning

Development

Promotion

- Business Case for Action



Solution Lifecycle



Planning

Development

Promotion

- Business Case for Action
- Automation Potential Analysis Tool



Solution Lifecycle



Planning

Development

Promotion

- Business Case for Action
- Automation Potential Analysis Tool
- Stakeholder Analysis

Solution Lifecycle



Planning

Development

Promotion

- Example – Real Estate Lease Transaction Management
- Example – Contract Review Process



Solution Lifecycle



Planning

Development

Promotion

- Communication Plan



Business Case for Action | Planning

What is changing? From....To

Current State (From)	Desired Future State (To)

What's the Business Case for Action? (Clarify the Change and Create Urgency)

Business Reasons for Change	Business Case Justification
What is the change? Who is authorizing it?	•
What are the purposes of the change? (Why now?)	•
What are the costs of <u>not</u> changing?	•
What disruptions might the change create?	•

Measures of Success *(What will success look like? How will it be measured?)*

- 1.
- 2.
- 3.

Business Case for Action Statement: *(Clarify the change and create urgency.)*

*We will do XYZ...
We anticipate potential barriers DEF...*

*In order to achieve ABC...
However, if we do not implement this change, GHI may occur*



Planning **Business Case for Action**

- Documentation of key outcomes of project, justification of project, and talking points to share with key stakeholders and impacted users.
- Concise view of current state and desired state.
(1 page)

Business Case for Action | Planning

What is changing? From....To

Current State (From)	Desired Future State (To)



Planning **Business Case for Action**

Business Case for Action | Planning

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Planning

Business Case for Action

Measures of Success (*What will success look like? How will it be measured?*)

- 1.
- 2.
- 3.

Business Case for Action Statement: (*Clarify the change and create urgency.*)

We will do XYZ...

We anticipate potential barriers DEF...

In order to achieve ABC...

However, if we do not implement this change, GHI may occur

Example: Real estate lease transaction management

- Current review process **not standard** for all leases.
- **Need to report** how many leases are being considered at any given time and show where they are in the review process.



Planning

Automation Potential Analysis Tool

- A visual planning tool
- Outlines your business process step by step
- Map out the process flow in Visio, PowerPoint or even Word
- Upon completion, analyze to identify points where a workflow could be imposed...







Planning

Automation Potential Analysis Tool

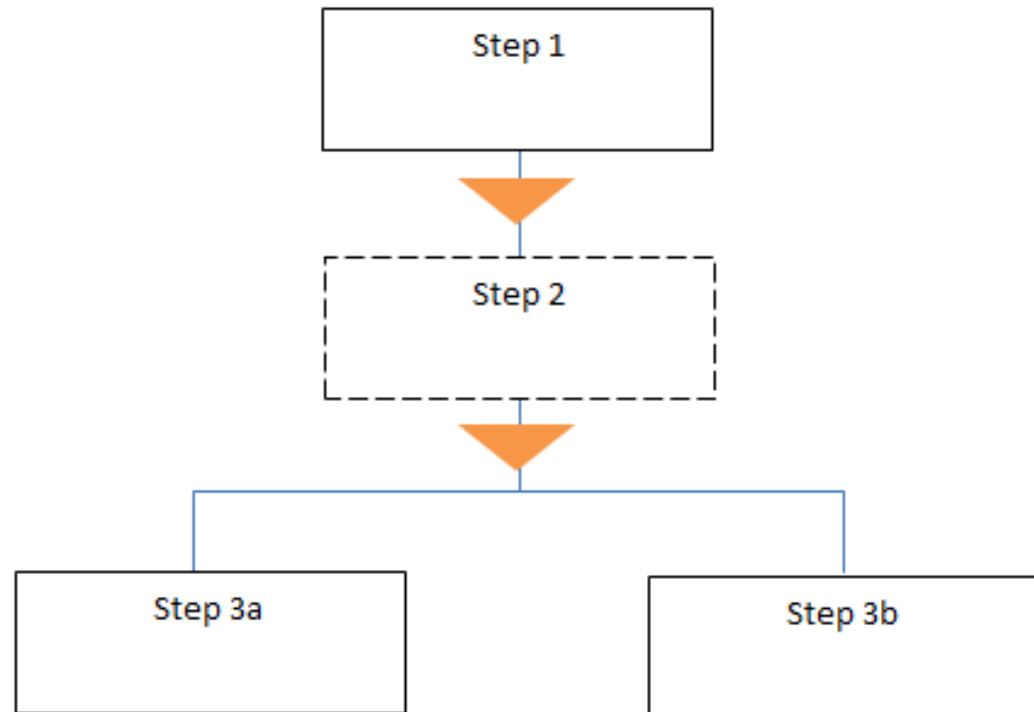


Automation Potential Analysis Tool

Use this tool to map out your process as it exists today or how the process should be improved.

Icon Library	
	Document/Form Modification
	Email Notification
	Approval Required
	Outside of Intranet

———— Process Standard
----- Process Varies





Planning

Automation Potential Analysis Tool

Strategy for Using this Tool:

- Document how your process is today... where are the issues? (Scenario: How requests for brochures or other printed materials are submitted to the marketing department)
 - **Issue:** *Lack of centralized collection point for requests, multiple avenues to submit a request (phone, email)*
 - **Issue:** *Missing preliminary critical information before the request will be considered*
 - **Solution:** *A web-based input form can standardize the way requests are submitted.*



Planning

Automation Potential Analysis Tool

Strategy for Using this Tool:

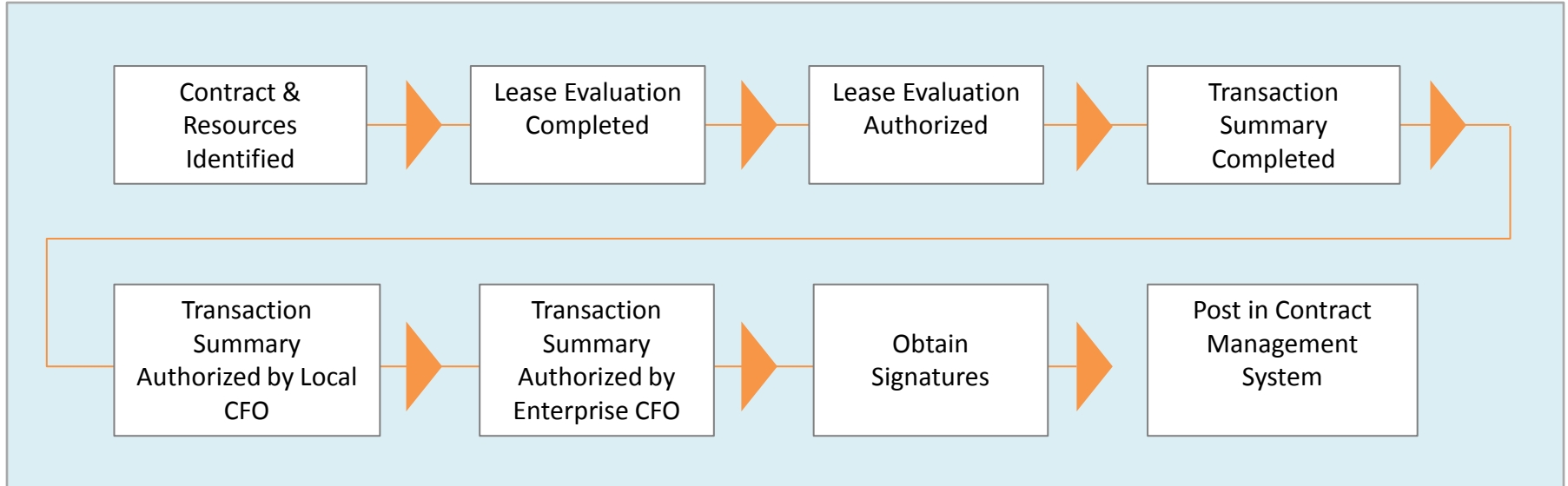
- Identifying where handoffs or wait states occur will help you know when to create a new box (create a new step)
- Note steps where the process is rigid (consistency is critical) could indicate a place where a workflow could automate the task, i.e., after Step 3 it is always emailed to Bob for review
- Note the action required for the step: Send an email, Complete a form/document, Review for approval.
- Who is involved at each step... does it vary?



Planning

Automation Potential Analysis Tool

REAL ESTATE LEASE TRANSACTION MANAGEMENT

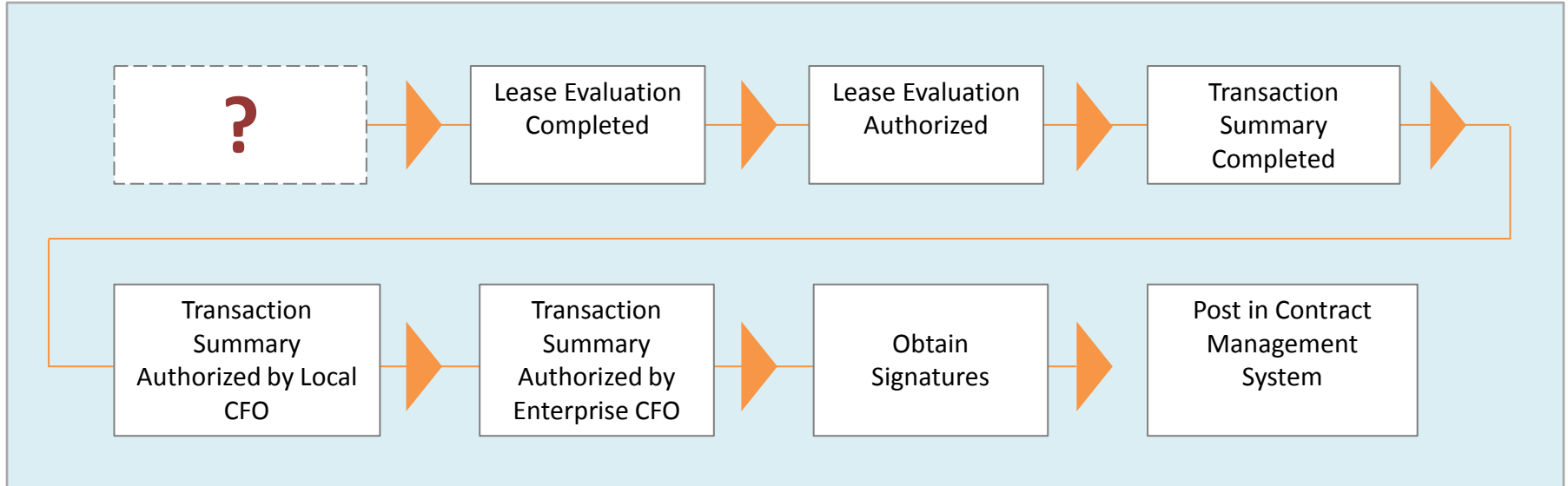




Planning

Automation Potential Analysis Tool

REAL ESTATE LEASE TRANSACTION MANAGEMENT

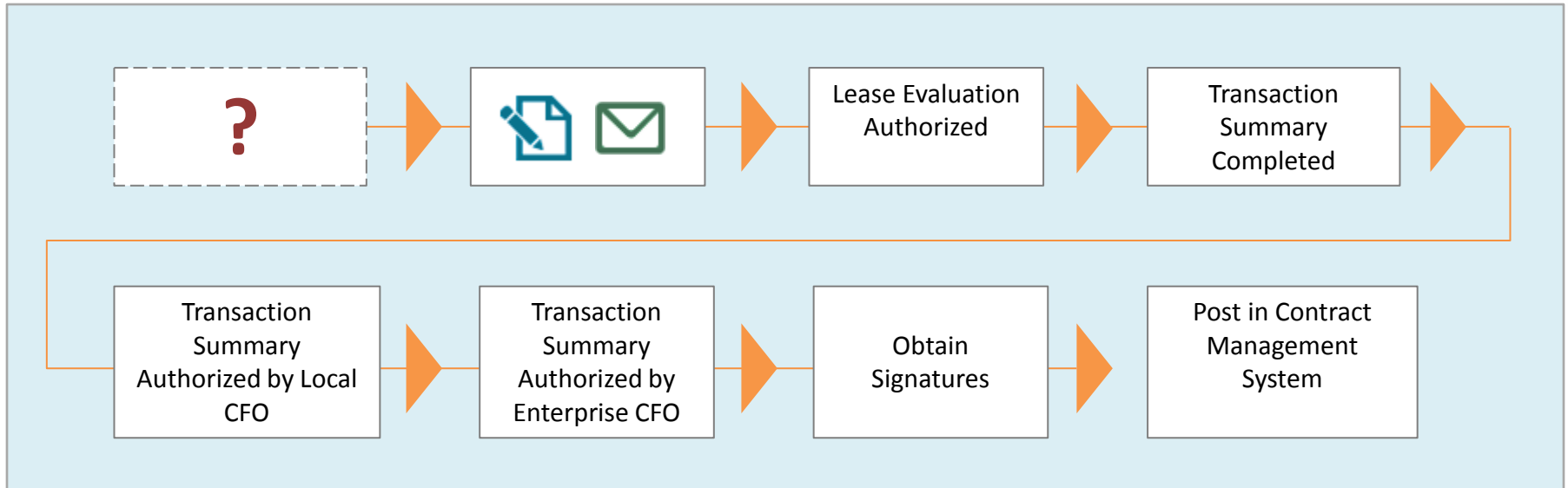




Planning

Automation Potential Analysis Tool

REAL ESTATE LEASE TRANSACTION MANAGEMENT

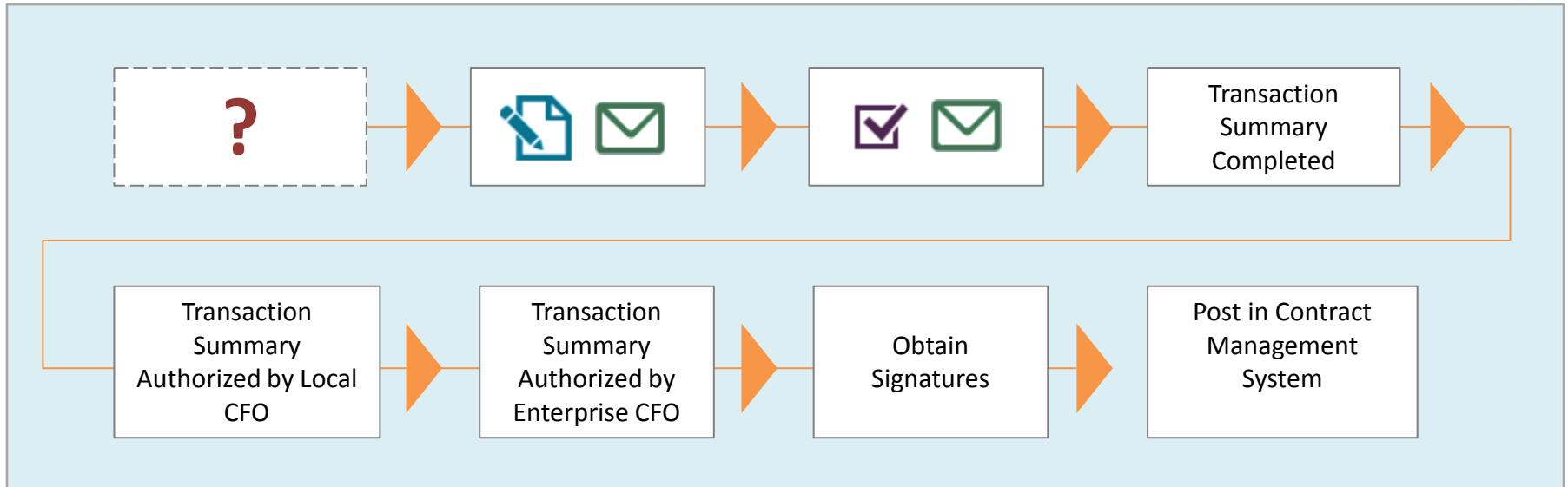




Planning

Automation Potential Analysis Tool

REAL ESTATE LEASE TRANSACTION MANAGEMENT

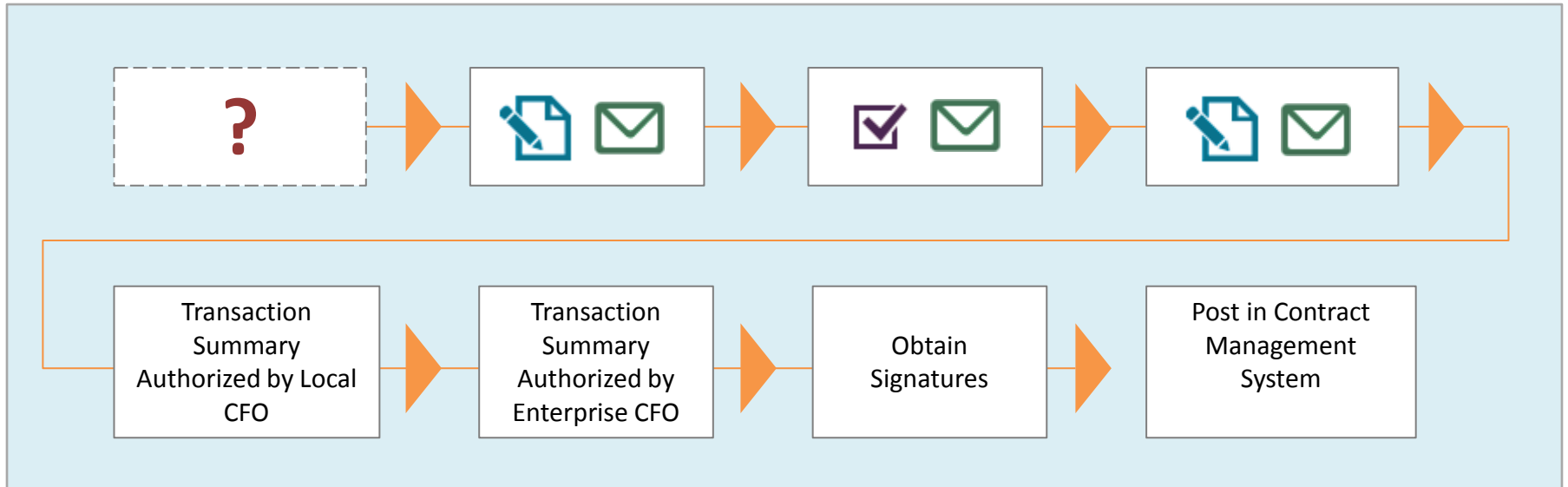




Planning

Automation Potential Analysis Tool

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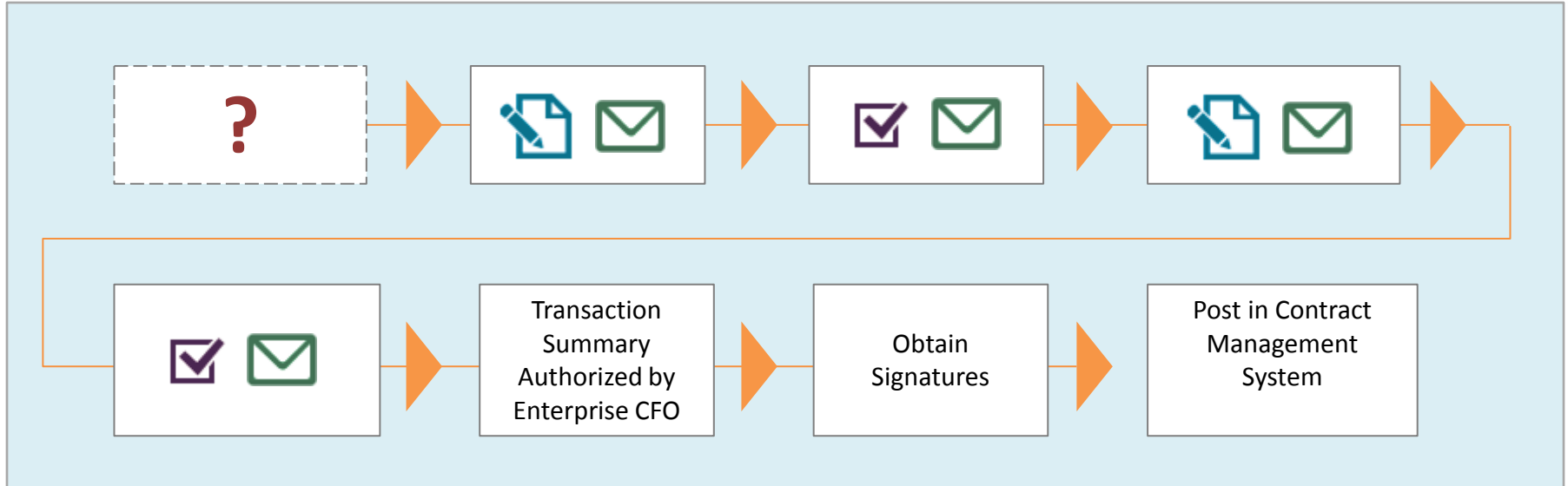




Planning

Automation Potential Analysis Tool

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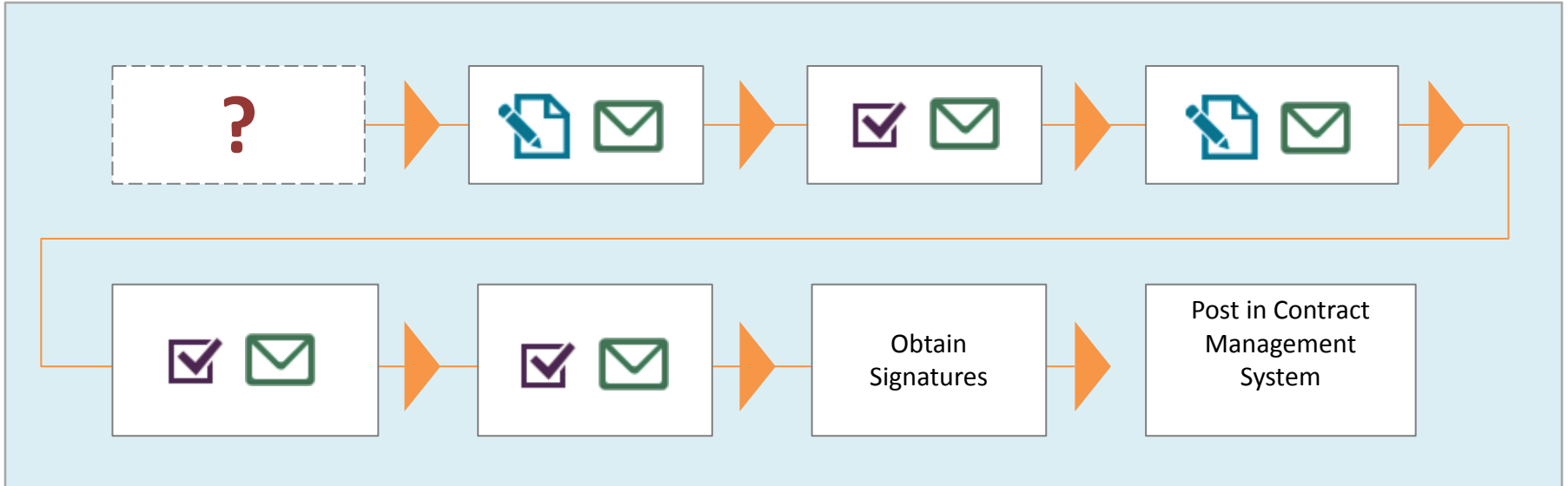




Planning

Automation Potential Analysis Tool

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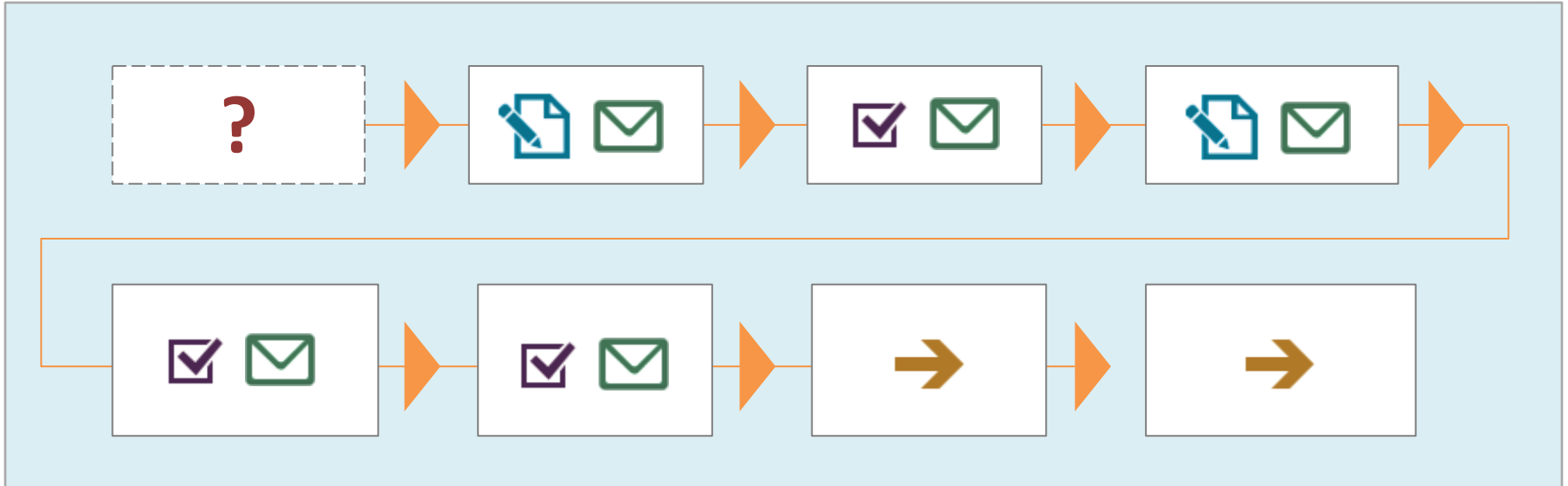




Planning

Automation Potential Analysis Tool

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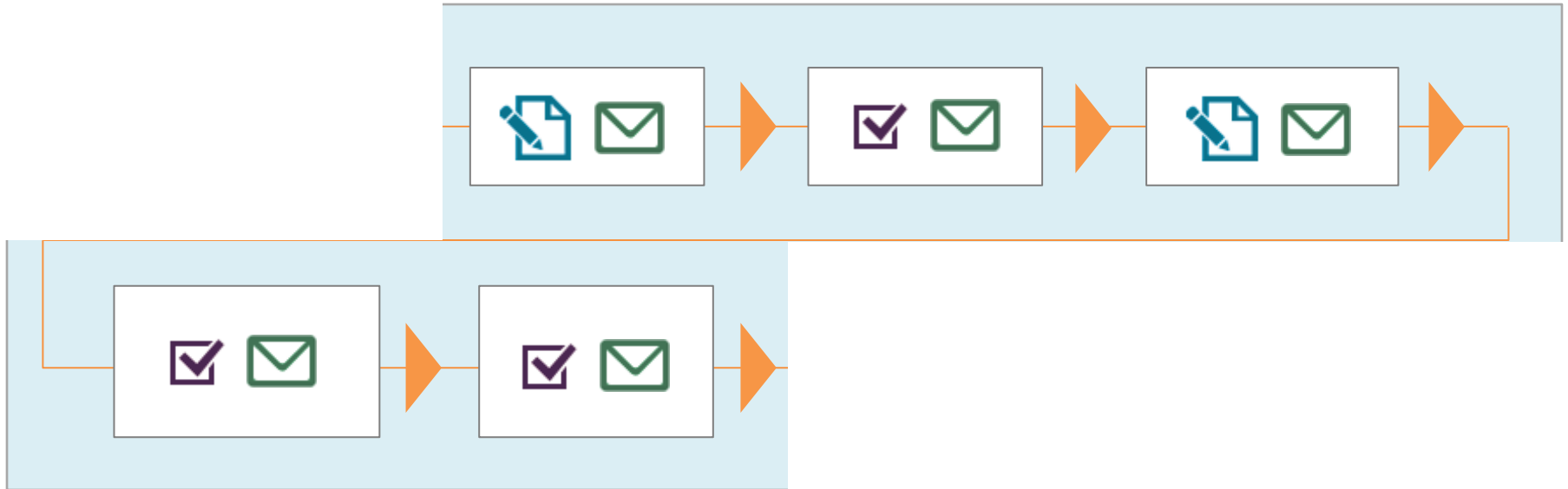




Planning

Automation Potential Analysis Tool

REAL ESTATE LEASE TRANSACTION MANAGEMENT





Planning

Automation Potential Analysis Tool

REAL ESTATE LEASE TRANSACTION MANAGEMENT



SP 2010 Team Site Document Library
Custom column: Workbook Status



Gatekeeper receives an alert for modified workbooks, changes the status as appropriate.



Change in workbook status triggers workflow for next reviewer.



Development

Site Actions   Browse Page

 Real Estate Lease Transaction Management Team Site ▶ Home

Leases

Libraries

Shared Documents

BSR Leases


SC Leases

HSO Leases

BSB Leases

KY Leases

BSHR Leases


 Recycle Bin

 All Site Content

Lease Documents in Progress

BSR Leases

<input type="checkbox"/> Type	Name	Workbook Status	Modified	<input type="checkbox"/> Modified By
-------------------------------	------	-----------------	----------	--------------------------------------


 Lease ID : Training (2)

 Add document

SC Leases

<input type="checkbox"/> Type	Name	Workbook Status	Modified	<input type="checkbox"/> Modified By
-------------------------------	------	-----------------	----------	--------------------------------------

 Lease ID : (2)

 Lease ID : Woodward (1)



Lease Workbook -Woodward

TSM Approval by LS CFO

7/6/2017 4:12 PM



Last, FirstName

 Add document



Development

REAL ESTATE LEASE TRANSACTION MANAGEMENT

Conditional Startup Options

Workflow Settings

Save Cancel

Commit

Start when items are modified and:

Workbook Status (previous value) ▼

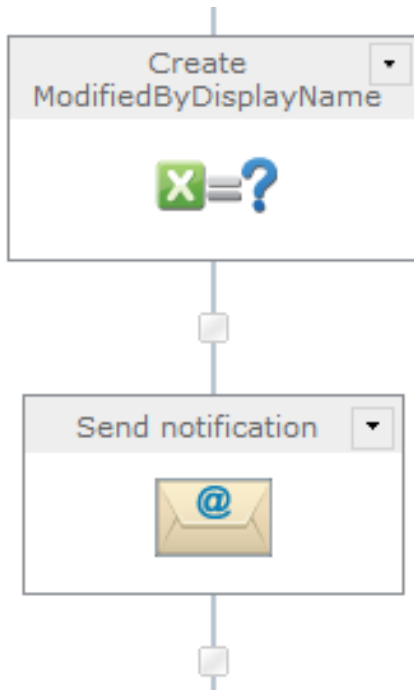
Not equals ▼ Compare to field?

Workbook Status ▼



Development

REAL ESTATE LEASE TRANSACTION MANAGEMENT



A One Footprint BSR Lease Workbook Status has been changed by ModifiedByDisplayName.

The file name is: Name

View the Workbook in the intranet.

ads/tlbuckma = Tami Buckman






Development

REAL ESTATE LEASE TRANSACTION MANAGEMENT

Modify Workflow Variable □ ×

Workflow variables

 Save  Cancel  Help

Commit Help

Name	ModifiedByDisplayName ×
Type	<input type="radio"/> Single line of text <input checked="" type="radio"/> Person or Group <input type="radio"/> Multiple lines of text <input type="radio"/> Integer <input type="radio"/> Choice <input type="radio"/> List Item ID <input type="radio"/> Number <input type="radio"/> Action ID <input type="radio"/> Date and Time <input type="radio"/> Collection <input type="radio"/> Yes/No



Development

REAL ESTATE LEASE TRANSACTION MANAGEMENT

Configure Action - Set variable

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Set *

ModifiedByDisplayName

Equals List Lookup

[-] Lookup details

Source Current item

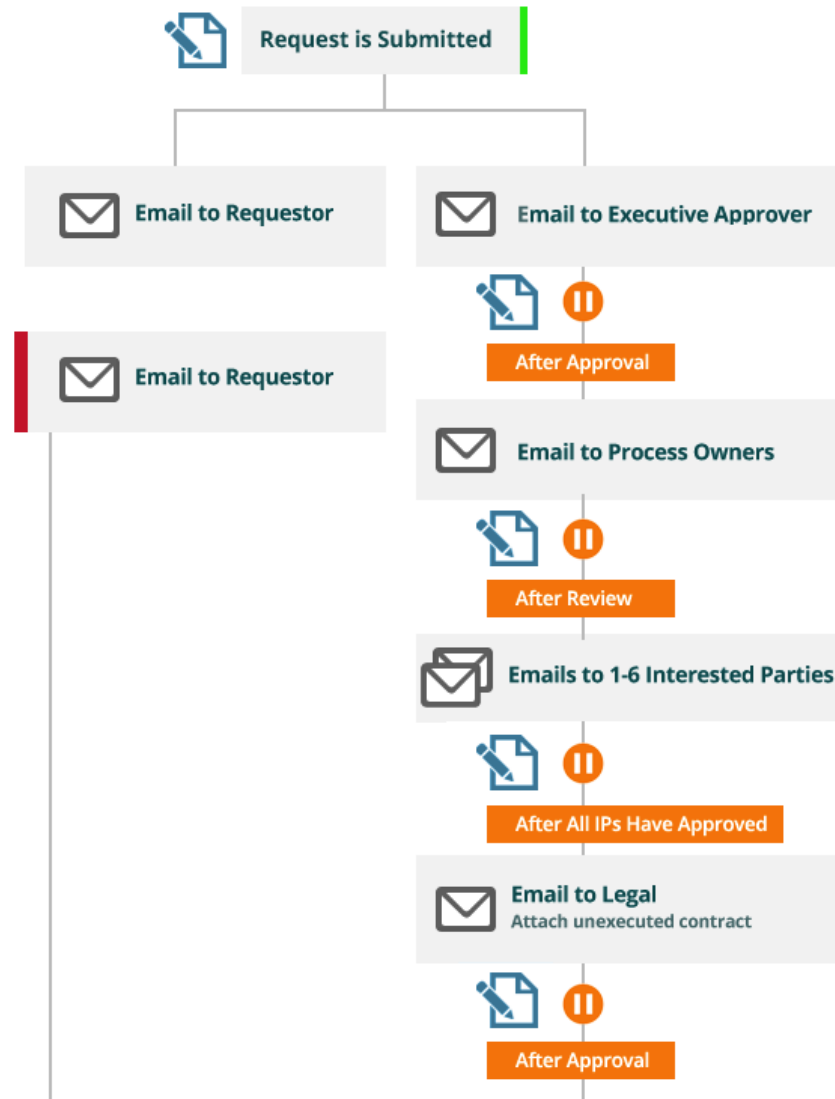
Field Modified By - Display Name



Planning

Automation Potential Analysis Tool

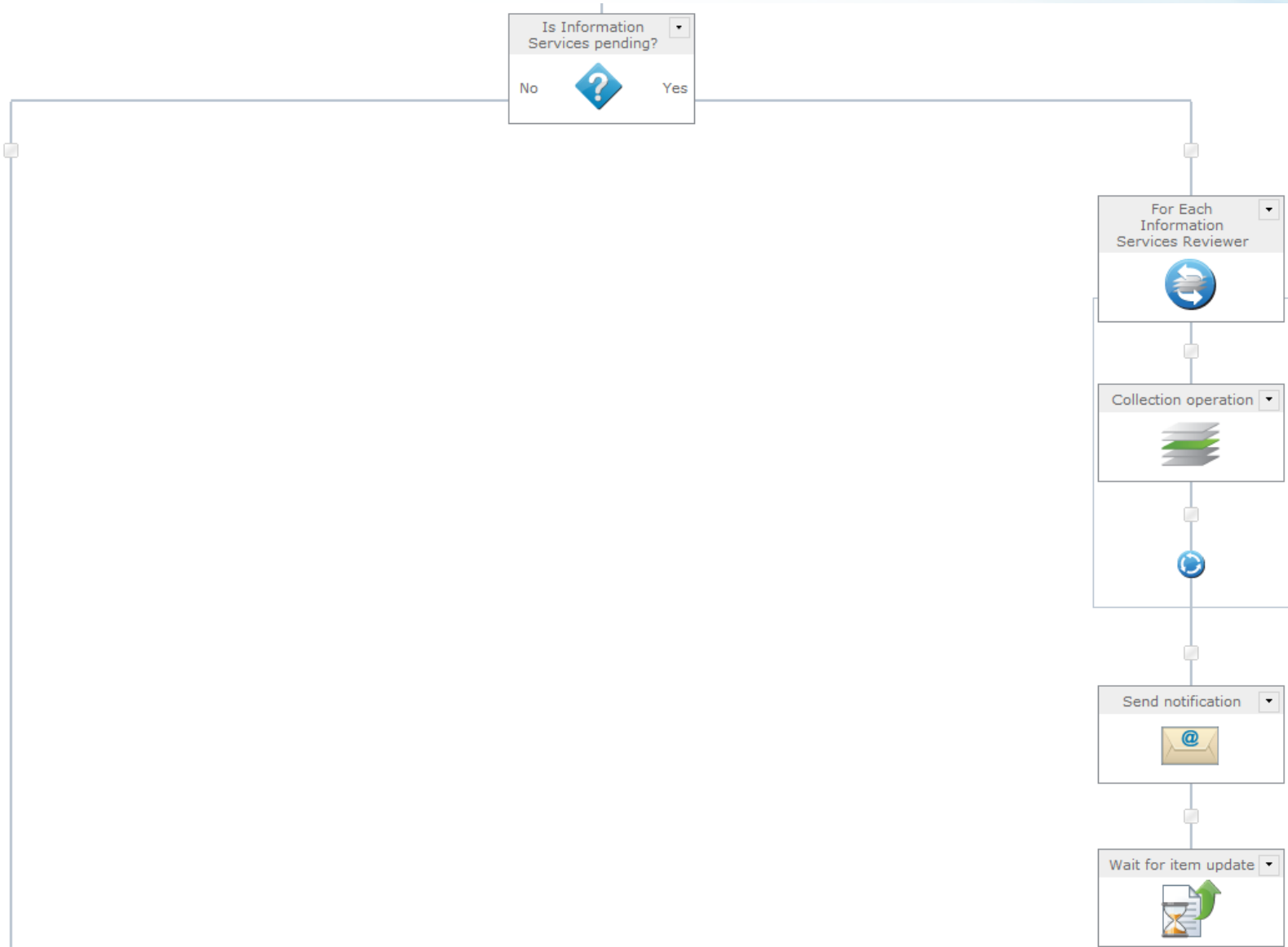
Contract Review Process



Contract Review Process – Input form

Select the Contract Type *	<input type="radio"/> New	<input type="radio"/> Addendum	<input type="radio"/> Renewal	<input type="radio"/> Other
Approximate yearly cost of the contract *	<input type="text"/>			
Does contract include/involve supplies/implants?	<input type="radio"/> Yes	<input type="radio"/> No		
Is this a contract for purchased services? (Refer to the definition on the left.) *	<input type="radio"/> Yes	<input type="radio"/> No		
Is this a contract for consulting? (Refer to the definition on the left.) *	<input type="radio"/> Yes	<input type="radio"/> No		
Is this an equipment placement contract that requires purchase of disposable supplies? *	<input type="radio"/> Yes	<input type="radio"/> No		
Is the contract for lease or purchase of clinical equipment? *	<input type="radio"/> Yes	<input type="radio"/> No		
Does this contract cover a service, equipment, software, or hardware that will require input, storage, transmission or receipt of sensitive information, e.g., business, financial, patient, or employee? *	<input type="radio"/> Yes	<input type="radio"/> No		
Does this contract require a third party to be involved in the collection, input, storage, transmission, or receipt of sensitive information? *	<input type="radio"/> Yes	<input type="radio"/> No		
Does this contract cover a piece of hardware or equipment that will be connected to the BSHSI network? *	<input type="radio"/> Yes	<input type="radio"/> No		
Does contract include/involve components that require construction or building modifications (water, electrical, HVAC, medical gases, suction, signage)? *	<input type="radio"/> Yes	<input type="radio"/> No		

Contract Review Process – Workflow



Contract Review Process – Administrative Panel

Executive Approval Status

Pending Approved Denied

Interested Parties Approval Status

MATERIALS MANAGEMENT / VALUE ANALYSIS

Approval Status: N/A Pending Approved Denied

Reviewers

Notes:

BIOMEDICAL ENGINEERING / VALUE ANALYSIS

Approval Status: N/A Pending Approved Denied

Reviewers:

Notes:

INFORMATION SERVICES

Approval Status: N/A Pending Approved Denied


Contract Review Process – Administrative Panel


Control Settings - Panel

General


Save Cancel Help
Commit Help

Name

Title 

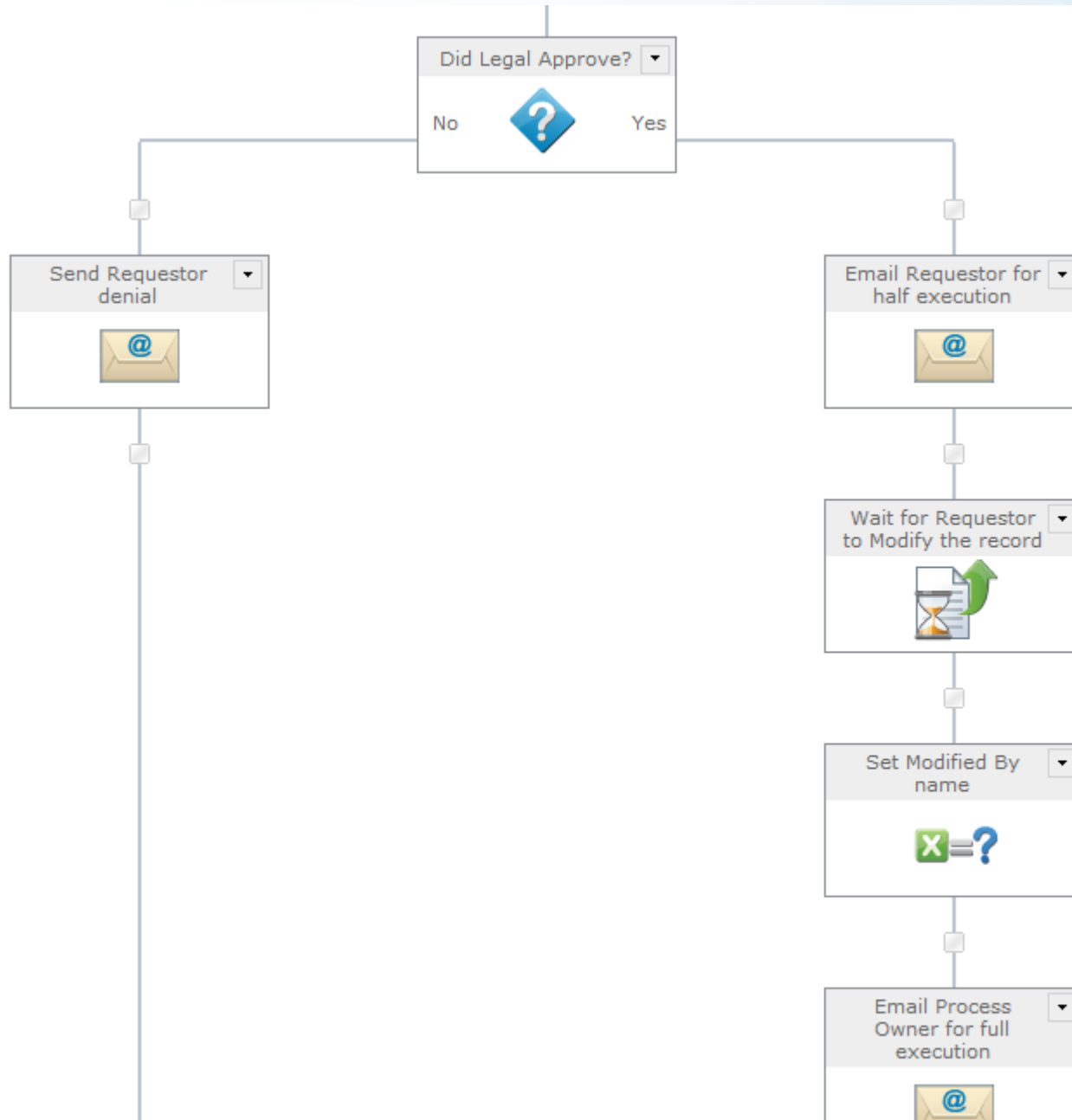
Background image 

[-] Appearance

Visible 

```
fn-Or(fn-IsMemberOfGroup(GVL Contract Legal  
Approvers), fn-Or(fn-IsMemberOfGroup(GVL  
Contract IP Reviewers), fn-IsMemberOfGroup  
(GVL Contract Approval Process Owners)))
```

Contract Review Process – Workflow





Planning Stakeholder Analysis

- Identify who is affected by this change and who will help get the project approved/completed.
- 1-Page document (minus instructions)

Stakeholder Analysis



Purpose: The ultimate success of your change initiative depends on whether or not your stakeholders buy in to and commit to this change. The sooner you can involve your stakeholders, the easier it will be to dissolve resistance and get everyone on board.

Stakeholder: Any person or group who will be impacted by the change and whose support you need.

Instructions:

1. Define the various key stakeholders. Remember to think as BROADLY as possible. Sometimes there are people/teams on the sidelines whom you may not think would be impacted by the change.
 - Identify a Senior Sponsor – someone at a senior level whom others respect and will listen to. This person can help remove barriers and approve needed resources.
2. Rate each stakeholder's current support for the change. (If you don't know their level of support currently ask them.)
 - (-) = Opposed (may work actively against the change)
 - (+) = Favorable (will actively support the change)
 - (0) = Neutral (will neither support nor oppose the change)
 - (?) = Unknown
3. Describe how the stakeholder will be impacted by the change (address *What's in it for them? Will there be any negative impact?*).
4. Consider what successful partnering with the stakeholder will look like. How will you engage/influence the stakeholder?



Planning Stakeholder Analysis

Resource Plan

Project Start Date:

Project Name:

Team Lead:

Senior Sponsor:

Estimated Project End Date:

General Information

Team Members:

-
-

Primary Stakeholder(s):

-

Primary Customer(s):

-

Needed Resources:

-



Planning Stakeholder Analysis

Key Stakeholder	Current support for the change (-) (+) (0) (?)	How will the change directly or indirectly impact this stakeholder? <i>(What's in it for them?)</i>	How will we engage this stakeholder so the project is successful?
Example: Bonnie Secours	(+)	Her recordkeeping process will be made simpler.	Set up a meeting next week to share the new process, and get her feedback and input.
Example: Department Staff	(?) Mixed	After completing the necessary training, some procedures will be more streamlined and give staff more time back in their day.	At staff meeting, present the new process and give lots of time for questions and feedback. Ask for input about the best way to implement the process so it works well for the staff.

- Rate each stakeholder's current support for the change. (If you don't know their level of support currently ask them.)
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 - (0) = Neutral (will neither support nor oppose the change)
 - (?) = Unknown



Promotion **Communication Plan**

- How will you ensure adoption for each distinct audience?
- What are the different mediums you will use?
 - In-person training
 - Communicate with posters
 - Send emails
 - Create a virtual or physical help center
 - Distribute job aids
 - Video tutorial
- Ensure your communication plan includes 2-way mechanisms:
 - How do new users ask questions?
 - Feedback mechanism within your new tool to help users though the change period and collect suggestions for enhancements for future releases.

Questions

