



Solution Design Methodology

Optimal workflows and sustainable systems,
driven by people, process, and data

Copyright © 2007 Up and Running, LLC

All information contained within this document shall be treated as
confidential and proprietary information and must be treated accordingly.

Table of Contents

| | |
|--|---|
| TABLE OF CONTENTS..... | 2 |
| DESCRIPTION..... | 3 |
| STEP 1 – WORKFLOW DESIGN SESSIONS..... | 3 |
| ■ WHAT ARE WORKFLOWS AND HOW WILL THEY HELP ME?..... | 3 |
| ■ PROCESS | 3 |
| STEP 2 – SOLUTION DESIGN & COSTING..... | 4 |
| ■ WHAT IS “SOLUTION DESIGN” AND “COSTING”?..... | 4 |
| ■ PROCESS | 4 |
| STEP 3 – IMPLEMENTATION | 4 |
| ■ WHAT IS “IMPLEMENTATION”? | 4 |
| ■ PROCESS | 5 |
| STEP 4 – ENSURING SUCCESS | 6 |
| ■ HOW DOES ONE “ENSURE SUCCESS”? | 6 |
| ■ PROCESS | 6 |
| CONCLUSION | 7 |

Description

This document explains Up and Running's solution design methodology, the goal of which is the design of optimal workflows and sustainable systems to support them. By enabling people with the right workflows and data, you will achieve new levels of cost-savings and efficiency.

Step 1 – Workflow Design Sessions

■ What are workflows and how will they help me?

Workflows are the processes by which all your work is done. These sessions lead to the development of workflows that are as efficient as they can be given your people and resources. Moreover, it will provide useful documentation for several other purposes: job description requirements, training documentation, policy documentation, and more.

■ Process

Here are the actions and deliverables associated with this process:

1. Current State Workflow Design

a. Actions:

- i. Document your current workflows
- ii. Interview all stakeholders involved in each workflow
- iii. Define key metrics by workflow and gather current metrics
- iv. Review draft set of current state workflows
- v. Finalize current state workflows

b. Deliverables:

- i. Interview summaries
- ii. Final set of current state workflows documented in Microsoft Visio

2. Future State Workflow Design

a. Actions:

- i. Review current state workflows with major workflow participants, ensuring that the goals of the workflow are agreed on
- ii. Update current state workflows if necessary
- iii. Create draft set of future state workflows
- iv. Review draft set of future state workflows
- v. Finalize future state workflows

b. Deliverables:

- i. Updated current state workflows
- ii. Final set of future state workflows documented in Microsoft Visio

Step 2 – Solution Design & Costing

■ What is “solution design” and “costing”?

Solutions are the means by which you move from your current state to your desired future state. There will be many solutions for each transition, so the solution set must be designed so that you achieve maximum payoff by using your resources efficiently. In summary, solution design is: 1) brainstorming options & 2) prioritizing those options within each workflow and analyzing all workflows to determine which mix will yield the greatest return.

Costing is the process of pricing out solutions so that solutions can be further prioritized and scheduled.

■ Process

Here are the actions and deliverables associated with this process:

1. Solution Design

a. Actions:

- i. Discuss opportunities for improving workflows
- ii. Prioritize opportunities within each workflow
- iii. Prioritize the importance of each workflow as compared to all workflows

b. Deliverables:

- i. Prioritized set of solutions by future state workflow
- ii. Prioritized set of final future state workflows

2. Costing

a. Actions:

- i. Review top 3-5 desired future state workflows
- ii. Cost out 1-2 options per future state workflow
- iii. Meet to discuss cost options
- iv. Cost out other workflow solutions and options as necessary
- v. Take next steps regarding evaluation and go-ahead approval

b. Deliverables:

- i. List of costs for 1-2 options for 3-5 future state workflows
- ii. Timeline for solution implementation

Step 3 – Implementation

■ What is “implementation”?

It depends. A workflow might be improved by simply changing a few steps in the process. More significant changes could take the implementation of a piece of software

or the hiring of a new team member. At the least, it is education and communication so that people understand how things should be done and how what they do affects the rest of the company.

■ **Process**

Here are the actions and deliverables associated with this process:

1. Implementation Design

a. Actions:

- i. Design of solutions
- ii. Meet to discuss solutions
- iii. Sign-off of solutions
- iv. Develop timelines for all solutions and confirm prioritization

b. Deliverables:

- i. List of approved solutions
- ii. Solution implementation timeline

2. Development or Implementation of Solutions

a. Actions:

- i. Create project plan by solution
- ii. Meet as necessary to accomplish tasks
- iii. Test
- iv. Train

b. Deliverables:

- i. Solution Documentation:
 1. Testing scripts
 2. Textual descriptions
 3. Screenshots with callouts of important features
 4. Updated workflows
- ii. Training materials:
 1. Syllabus
 2. “Cheat Sheet”
 3. Training exercises
 4. Training documentation

3. Training

a. Actions:

- i. Define who should train people (super user(s))
- ii. Define who should be trained
- iii. Develop plan and implement

b. Deliverables:

- i. Finalized training materials
- ii. Trained team members
- iii. Test results of training by team member

Step 4 – Ensuring Success

■ How does one “ensure success”?

Putting the process in place to ensure the process is being followed, people are educated, and the right data is getting to the right people at the right time. Using metrics and updates in a disciplined fashion will ensure that your systems are operating well and that deficiencies in the system are corrected promptly.

■ Process

Here are the actions and deliverables associated with this process:

1. Define Success and How to Monitor It

- a. Actions:
 - i. Use metrics defined earlier in project, and/or update these metrics
 - ii. Define processes and means to gather metrics:
 - 1. Triggers
 - 2. Reports
 - 3. Status “dashboards”
- b. Deliverables:
 - i. List of metrics and what the ideal metrics are by role
 - ii. List of processes and means to track metrics

2. Implement Means of Tracking Success

- a. Actions:
 - i. Implement system to define and track metrics
 - ii. Train people on how to use metrics to enable success
- b. Deliverables:
 - i. Implemented systems for defining and tracking metrics
 - ii. Team members are trained to use tools that measure success

3. Review System Periodically

- a. Actions:
 - i. Scheduled visits to learn about system issues
 - ii. Develop plan to address issues; examples:
 - 1. Training refreshers
 - 2. System updates
 - 3. Additional means to track success
 - iii. Implement plan
- b. Deliverables:
 - i. Updated documentation
 - ii. System updates
 - iii. Retraining

4. One-year Anniversary Survey

- a. Actions:
 - i. Survey each person in the process
 - ii. Consolidate results
 - iii. Create report

- b. Deliverables:
 - i. Survey results report
 - ii. Action items and next steps

Conclusion

Up and Running believes people can achieve great results with the right tools and the right data. It would be our honor to help you analyze your business operations to design solutions that reduce cost, reduce training time, define what is done and by whom clearly, and create opportunity. If you have questions, please call or email Up and Running at any time.

Sincerely,

Up and Running

Pete Hanson: Pete@uarss.com | 906-281-1178
Ian McKilligan: Ian@uarss.com | 906-281-2627

Up and Running

Phone: 906-483-4917

Fax: 866-815-5109

Website: www.uarss.com

“A company should build a process that systematically looks at every product, every service, every process, every policy, every market with the question, ‘If we weren't doing this already, knowing what we now know, would we start it, would we go into it?’” **Peter Drucker**