Employee vs Process

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Objectives

- To understand the need for identifying key and critical processes within an organization
- The importance of creating flow charts
- How to use a flow chart to identify a break in the process or an individual's flaw
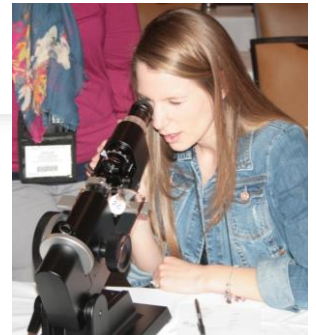
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Employee versus The Process

- If it is the process – review the steps and make the correction within the steps

- If it is the employee – reteach, retrain, replace if necessary

- This is not personal

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Moral Role Components

- Individual principles

- Individual character

- Consequences of a particular action

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Business Ethics Consistency

Decisions are not always a clear "yes or no" or black or white. The complexity of the decision must be considered. This can be sticky.

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Top-Down Decision Makers

- These people are vulnerable to peers and superiors, and the pressures of making decisions can be tremendous
- Sets and example for and impacts others in the organization

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Who's In Charge?

Leaders must establish what is acceptable and unacceptable behavior. Failure to execute on their role as a leader could cause the demise of the entire team


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Does Your Culture Inspire?

- Does your culture inspire those in it to reach higher
- Does your culture beat your workers down
- How does your culture inspire others to come forward when mistakes are made
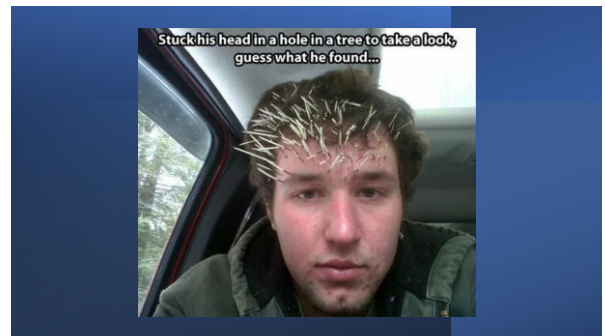- Does your culture throw its members under the bus

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Bad Process Signs

- Insulting
- Nebulous – vague/unclear
- Defies reality
- So bad people avoid it
- Arbitrary - random
- Slow
- Outdated (review annually)
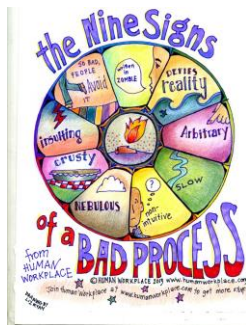
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Identifying Key and Critical Processes

- Booking appointments
- Screening patients
- Directing referrals
- Directing emergencies
- Ordering/tracking orders

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Process Defined
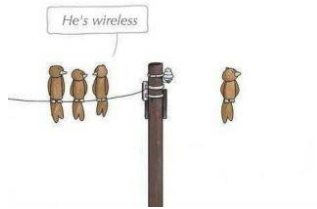
- *a (1)*: a natural phenomenon marked by gradual changes that lead toward a particular result <the *process* of growth> *(2)*: a continuing natural or biological activity or function <such life *processes* as breathing>

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Process Defined

b: a series of actions or operations conducing to an end; *especially* a continuous operation or treatment especially in manufacture

He's wireless

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The need for clear processes

- Provides a checklist
- Protects the organization
- Protects the staff
- Protects the patients
- Identifies exactly what is supposed to happen and who is responsible
- Eliminates finger pointing

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Sample

- Making a pair of glasses
  - Phone call
  - Book an appointment
  - Patient exam
  - Doctor's Rx
  - Technician fit/measure
  - Optician fabricate/verify
  - Dispensing tech verifies and dispenses
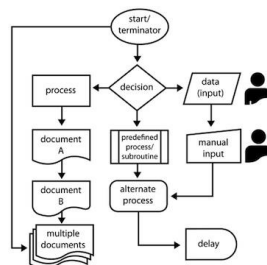 - Patient leaves happy

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Benefits of building processes as a team- Buy In

BENEFITS OF TEAM BRAINSTORMING

Engagement   Efficient collaboration   Thoughts organization

New ideas   Understanding   Shared priorities

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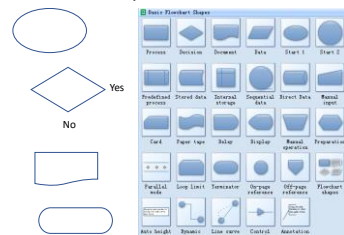## The importance of creating flow charts

- Standardize process for everyone

- A staff reference document

- A trouble shooting instrument

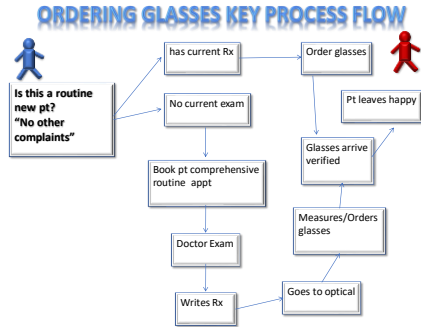17

## Common Flow Chart symbols

- Start
- Decision
- Documents
- Terminate

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ORDERING GLASSES KEY PROCESS FLOW

Is this a routine new pt? "No other complaints"
- has current Rx → Order glasses
- No current exam → Book pt comprehensive routine appt → Doctor Exam → Writes Rx → Goes to optical → Measures/Orders glasses → Glasses arrive verified → Pt leaves happy

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Key Processes

- Those processes that can derail the operation
- Showstoppers
- Flow charting
- Decision trees
- Critical areas
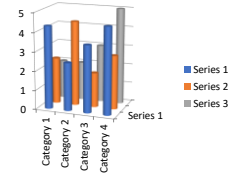
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Identifying Key Process

- Let's everyone know how each critical process is supposed to flow
- Aids in making corrections to the key process
- It might look a little strange at first

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Process must be consistent…

- Clearly define
- Easy to understand
- Place in a location that makes sense
- Adhered to by all; top-down…

future generations will never know about this unique relationship

EMBRACE
WHAT YOU SHOULD KNOW

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Goals Must Be Realistic

YOU WANT IT WHEN?

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Test: Discuss Key Process

- Before finalizing the process must be tested
- Review key processes annually to very the operation…date the process
- Make corrections

ANTI-STRESS KIT

BANG HEAD HERE

Directions:
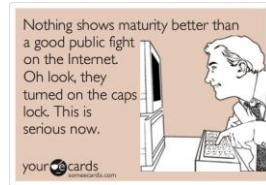1. Place on FIRM surface.
2. Follow directions provided in the circle.
3. Repeat until you are Anti-Stressed, or become unconscious.

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Decision Tree

- Flow charts can have built-in decision trees which can be useful in important situations such as "triage", appt types, disease management

- Helps eliminate 90% guess work

- Every scenario may not be covered in a decision tree

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Employee vs Process

- If the process was clearly defined

- Tested

- Posted in an easy to locate place…

- You have eliminated the guess work and can now identify if the process or the individual failed
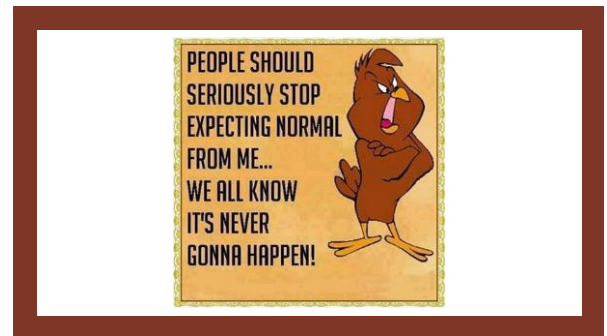

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Aids in training

- Provides a clear checklist

- Step verification

- Reference tools

- Quality Assurance

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Review

- To understand the need for identifying key and critical processes within an organization
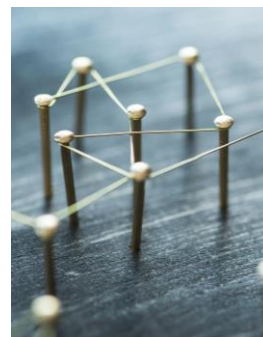
- The importance of creating flow charts

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Helpful sites

- Free Flow Chart Maker
  http://www.smartdraw.com/specials/ppc/flow-chart-maker.htm?id=264550

- Free Flow Chart Generator
  https://www.lucidchart.com/pages/tour/flowchart_generator

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Thank you

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