Solution Design Methodology
Optimal workflows and sustainable systems,
driven by people, process, and data

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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

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"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**