NWX-HHS-AOA-1

Moderator: Lauren Solkowski
August 25, 2016
1:00 pm CT

Coordinator: Welcome and thank you for standing by. At this time all participants are in a listen-only mode. During the question and answer session please press Star 1 on your touch-tone phone. I'd also like to inform parties that today's conference is being recorded. If you have any objections you may disconnect at this time. Now I'd like to turn the conference over to Ms. Lauren Solkowski. Thank you ma'am. You may begin.

Lauren Solkowski: Great. Thank you so much. Good afternoon everyone and thank you for joining us today for the Administration for Community Living Business Acumen Webinar on workflow design. This again this is Lawrence Solkowski with ACL and I will be facilitating our Webinar today.

So for today's Webinar we have invited Krista Boston with the Minnesota Board on Aging to present on workflow design. The – she'll talk about some of the important stakeholders that should be involved in the process as well as development and implementation of a workflow model.

So before we begin with her presentation I have a few housekeeping announcements. So first of all let's see if you could please use the link included in your calendar appointment to get onto the WebEx so that you cannot only follow along with the slides as we go through them but also to ask your questions when you have them through the chat function. If you don't have access to the link that was emailed you can also go to www.webex.com, click on the Attend a Meeting button that is located at the top of the page and then from there you can enter the meeting number. Today's meeting number is 663388582. Again today's meeting number is 663388582.

If you have any other problems getting onto the WebEx please call the technical support number at 1-866-569-3239. Again that number is 1-866-569-3239. As our operator had mentioned all of our participants are in a listen-only mode however we do welcome your questions throughout the course of the Webinar. And there are two ways you can ask your questions the first of which is through the chat function in WebEx located there on the right-hand side of your screen. You can enter your questions there throughout the presentation. And then once Krista has completed her presentation we will sort through them and answer your questions.

In addition to the chat function you can also ask your questions through the audio line. When that time comes our operator will provide instructions for us as to how to queue up ask your question. And then lastly if there are any question that we cannot answer during the course of the Webinar please feel free to email them to me I have entered in my email address in the chat box there on the screen.

And also we are recording the Webinar. We will post the recording of the Webinar, the slides and the transcript on ACL Web site as well as on the MLTSS Network Web site. I have also entered those in the chat box as well.

Okay so with that I would like to introduce our speaker, Krista Boston. Krista is the Director of Consumer Assistance Programs for the Minnesota Board on Aging and the Aging and Adult Services Division of the Minnesota Department of Human Services. Krista's team manages the Senior LinkAge Line and actively supports and partners with the Disability and Veteran's LinkAge Line. Her work includes Minnesota's nationally recognized and award-winning minnesotahealth.info Web site which now includes quality information including consumer reviews, supports to the linkage lines and is also used by case managers and care coordinators to help people find home and community-based services.

She has successfully launched several high profile reform projects that lead to savings to the state budget including most recently she led the launch of a successful expansion of care transition support through the Return to Community Initiative which helps privately paying elderly. Her team also launched a completed redesign of preadmission screening and is now embarking on the creation of a registry for people needing personal care attendant services. So Krista thank you so much for joining us today and with that I will turn it over to you.

Krista Boston: Thank you. I really appreciate getting to talk to this group and look forward to the conversation. I also have with me today Stephanie Minor who is one of my three designated leads for the Minnesota Health Network. And she oversees not only the redesign of the PASRR system that was talked about their but the Senior LinkAge Line in general. And she is our primary business modeler and so she's going to get a chance to talk to you a little bit about what she does when she works her magic and creates workflows.

So I was really pleased to be asked to talk about this because I've got to tell you this is probably one of the best things that I've ever done personally both and personally and professionally. And that is just too by mere happenstance and magic discover business process modeling. And I'll tell you a little bit more about how that happened first if you advance the slide Lauren. My - one of my favorite quotes in the world which is really kind of encapsulates performance and especially knowing that Winston Churchill who really led large-scale government efforts and what he said how beautiful the strategy you should in fact occasionally look at the results. And I think in government we have that challenge. We love - I know I am surrounded by idea people, great idea people but they don't always want to do the implementation and look at the results.

And I'm a very results oriented person. And one of the wonderful things about these workflow designs strategies is you can in fact get really clear on what you're designing and then look at the results. So if you go to the next slide.

So why would you want to do workflow design? And I don't know what everybody's knowledge is in this area so I'm going to assume that there is a basic knowledge. But I'm sure some of you have done this so I want you to know I'm probably preaching to the choir for some of you.

But workflow design is absolutely critical to have a successful product deploy. Whenever we're looking at designing anything in Minnesota with regards to the Minnesota Health Network I always like to use the Coca-Cola test. And if any of you have heard me talk before I use Coca-Cola a lot because to me what we're developing and putting out the door if you are in the corporate world they wouldn't look at you any differently if you're developing a product to sell the health plan then if you're developing a product to put in a vending machine.

So I always say if Coca-Cola wouldn't do this, neither would we because they know how to sell Coca-Cola and they know how to make people recognize it and they generate revenue so they're very good. And so when you look at product development you have to be able to know what your productivity is right? You have to be able to know what it costs, how many staff it takes and then what it is that they're developing. And you also I think really importantly have to know if there are errors in the process because errors create costs for a company. And so if you want to make profit you have to reduce your errors.

And of course we know products succeed or fail based on whether or not they can market themselves, and as the slide says distinguish themselves from the competition. And you're not going to know if you can do that if you're not clear on what is your product and what are the costs. And as I said profitability is hampered by weight so if you've got extra steps in the process all you've done is created waste and that's going to reduce your profits. And I'll talk a little bit of both the lien kaizen process and how it can improve that. And you won't be able to know what that waste is unless you know the process fully.

Go to the next slide. I went out for this presentation I was looking for some sort of way to frame up how what I'm talking about fits into the product development process because I'm going to be guessing as that is a part of your business acumen discussions and technical assistance you've gone through all of these things. And I know Lauren told me that you're all kind of at the point where you've decided that you got a plan and you're ready to do some workflows or may have done them already. And so where does this fit in?

And I found this eight step process. There's others I'm sure. I thought this was really good. You know, you start with an idea. You figure out if it's good. You do some concept testing. You know, in government we call this piloting stuff right? You - then you do business analysis. You determine what the product costs and how to get it out the door. Then you test the product, you do marketing and then you do large-scale implementation and then you evaluate is this successful? Are we making any money?

And it’s actually very similar to what we do in government but just I know oftentimes we get stuck in the pilot phase right? And so getting to that large-scale implementation is always the challenge. If you go to the next slide I think where this fits it is under the Business Analysis section. This is where, you know, you have organizations bringing in business analysts. And we actually hire and contract for business analysts and bring them in.

And they do a lot of work related to developing these kinds of workflow products and then they develop requirements around them. And so that business analyst is really kind of a key person. And I don’t really think government started using them until probably about five years ago at least in Minnesota.

You know, they’re not every - they weren't everywhere for sure and they seem to be everywhere now. You know, we’ve got - it took a while to get project managers and then the project managers started bringing in business analysts. Well now they’re practically taking up all floors at the Department of Human Services but that’s really I think where this fits.

So if you go to the next slide, you know, if you’re going to develop a workflow and a good workflow design, you know, really who are you looking to bring in? Well I could sit here and say that you have to go out and find a business analyst and get them in here and train them up in what you’re doing. But we’ve never done that and there’s good reason.

You know, I'm a great believer that people that manage programs in the government sector must be able to do good program design and they must be able to do good program analysis. And so long ago historically about I want to say it was 2008 I started sending all of my team members to go take this Lean training which I want to talk about shortly which really helped us start to think differently about how we do program design. So I actually don't think you need to go out and find a business analyst. And in fact as I said, you know, Stephanie who's sitting with me today presenting is our primary business modeler. And she's got a master's in public policy and is the leader of the Senior LinkAge Line. She's never been a business analyst only has she gotten some training and done this. She's got the skills, knowledge skills and ability to do it.

The other thing you have to have then is really good facilitation skills especially if you're going to bring in stakeholders and engage large groups and do these workflow designs. So as I say here on this slide really anyone can do business process modeling frankly but there are some caveats. They have to be an organized thinker. They have to be able to develop a logic model or a process model on-the-fly discussing it with different people. And that does take some interesting skills. It's not everybody can do it.

In fact if you decide to do this in the house you may want to kind of find your interesting set of talents that you have to come up with is somebody that can facilitate a group but also has details skills and can be consistent and constant in their approach to working with this kind of information. They have to have documentation skills. And you can send them to business process modeling training and they'll come back and hopefully be, you know, able to do this.

There are still others they could participate in the process but maybe they don't have the skills to do it. Well those are people that hey if they can type something into Word they can type it into a Visio diagram. So I will have them may be on the side to documentation. And there may be still others whose job it is to sit in the audience and walk the microphone around if you need a microphone because of the setting you’re in.

So I try to use my entire team and their skills to the business process modeling sessions but not everybody is actually doing the modeling so know that there is a certain set of skills. They have to be able to get into the details of a program and really translate what is very, very abstract and coming out of people’s mouths abstractly oftentimes and then put it into details and that’s a special skill.

As I say here on the slide they have to be able to ask critical questions in a nonthreatening way. You know, you’re standing up in front of a bunch of stakeholders. And I will tell you we have brought in very what’s the word? I had to use the word hostile so I won’t say that but they’re interested in what we're doing kind of stakeholders and they're asking what can be really kind of, you know, probing questions about our work. And we have to facilitate the discussion and be able to ask them a critical question to really get to what they’re asking us to do. That’s a special skill. It really does take facilitation skills.

And then you have to be able to challenge your stakeholders. I’ll tell you we brought in administrators of nursing homes and nursing home discharge planners and social workers into a room and they were not happy with us. They thought we were going to be putting a date up at the nursing home and not letting people out or not letting people in right? And they were very worried about losing revenue.

And after a three-day process and really kind of getting into what were the real concerns we were able to get to a good program design that rolled out flawlessly. But we had them at the table and we asked them those critical questions. So you have to bring that good facilitator in to do that.

So next slide a little bit more about our Lean efforts. So Lean is something that's being used out in various industries right now. It really came out of manufacturing and prior to that it came out of Toyota it was called kaizen. And we started using these Lean approaches in aging in 2010 and that was because we had an initiative called Return to Community that passed the legislature.

And what we were doing was try to help people who are privately paying. So this is like MFP, Money Follows the Person but there privately paying people. They're not on Medicaid. And we wanted them to return home. And we were going to do that.

And we had some research information we had gotten from the University of Minnesota and from the University of Indiana through Drs. Greg Arling and Dr. Bob Kane and we had learned that there were people that should have return home that didn't and we were trying to figure out why because these are high need people. They should have gone home. And so we designed a process that got some funding to start helping people move home.

And as you can imagine it's a pretty detailed map, business process map that has a lot of risks associated with it and had a lot of interested people in the room. As I said we had nursing homes. We had discharge planners, we, you know, not only nursing home administrators but we had administrators here at the state that were involved but also at nursing homes and then we had social workers and discharge planners.

And then we had advocates who were, you know, adamant that we needed to do this. And it was really it could have gotten very contentious. But what happens is we were able to do this business process model where everybody can see really visually what's going to happen on the wall. They get to have input into it. They get to ask all of their questions. And over a three-day period in the woods and Wisconsin in a retreat center we modeled out this entire process. And to this day there they're not really threatened by it. You know, it's had its moments but overall it's been a nonthreatening experience.

And in fact some of the nursing home advocates have come back later and they've said, "Krista I wish everybody in government would do what you do because you're transparent. We know what you're up to." And I say, "Yes, I think that would be smart if they did that," because when you're transparent with someone even if it's going to impact them maybe negatively at least it's predictive for them and they know it. And I think when you're trying to hide stuff is where you get yourself into trouble.

Okay so next step how process modeling supports the Lean kaizen. So the first thing you do is so the way kaizen works is you identify something that needs a process improvement. You know, it might be that you want to reduce the cost of copying. It's something as simple as that or it might be you have to design a new program and it's got to be up by next Thursday right? I mean we've done that believe it or not.

Right after the shutdown my team had 52 days to roll out a program because it passed in the middle of the night at the legislature. And the very first thing we did was a week after we came back from that shutdown we scheduled a business process modeling session with all the stakeholders and designed that program. And within about 48 days it was up and running. So you can do it, you know, if you have good discipline approaches.

So you identify a program need or a process improvement need. You identify everybody that needs to be at the table. Now you’re not going to get everybody necessarily but sometimes you can also then later identify more and I’ll talk a little bit later about using additional stakeholder strategies.

We don’t use Visio which is a tool you put these swim lanes in. We don’t use them during business process modeling sessions. And the reason is they're hard to see. You cannot as a projector using a projector make them big enough for everybody to see. You're going to have a lot of boomers in the room that are, you know, have progressive bifocals. They're - they have to be able to see it.

So we use very large sticky sheets that we put up on the wall and very dark black brand-new markers. And we literally draw everything on the wall and that's Stephanie and a colleague of hers. And then we have somebody sitting on the side doing these Visio diagrams. And at that point when you start you have to define who is a part of the process.

So the first thing you start out with is okay, well you guys are probably developing a product that’s going maybe serve consumers or professionals. So the very first thing you’ve got to figure out is who's buying the product and then they're a swim lane. And then you've got to figure out well who's delivering the product to them? That’s a swim lane. Then you’ve got to figure out well who's doing the operations or the marketing? That’s a swim lane. All of those are swim lanes and then you start identifying the process. So that’s how we actually start putting together a business process model.

If you go to the next slide I just have a quick caveat here that I want to introduce the group to what's called the seven wastes. Now a part of the kaizen Lean process is something called the Seven Ways. And it's absolutely critical. When you learn about Lean you're going to learn about how Toyota approached all this. And, you know, Toyota has had its moments recently but frankly they are darn good cars. I honestly just bought one and I love my car and my car loves me.

But, you know, Toyota is really a well-run organization and they started this, there was an engineer there that created it. And it really stands for or the used the word (Muda). So the waste represent (Muda) which is utility usefulness or wastefulness.

We don't usually use those terms. We like to kind of turn it around as a positive or a strength-based approach and we talk about adding value. Does this process add value? And if something adds value then you need to add it to the process. Adding value means you're going to get more profit or you're going to reduce waste or it's absolutely critical to the process. If something doesn't add value then your goal when you're doing your modeling is to work to fully eliminate it.

Now an example of that is one of the seven wastes -- and I'll talk about them on the next slide -- is review. And managers are great problem in the process. We create a lot of waste. And I know I do to. I tell people I'm the Martha Stewart of putting good programs out the door. I want it to look really good and I get embarrassed when our products look shoddy. I really do. And so I like to see everything that goes out the door. And I also like to know what's going out the door, some of it's just knowing right?

And what I can do is I can really hamper the process. And of late in the last five years I've been trying to get better at not wanting and having to look at everything and trying to know what can go out without my review and what has to have my review because I don't want to create waste. But it's hard it's hard as a manager. You know I want to see this stuff right?

And so part of my process is to try to eliminate when I don't need to do a review do I really need to see it, can I learn about it later right because otherwise I'm just creating waste. So the Japanese describe identifying waste as learning to see. So as you're going along and you're doing business process model you have to train your brain to learn to see the waste that you either might be creating in a new process or trying to eliminate in an old one but you have to see it to eliminate it.

So on the next slide this is a graphic of the seven wastes and you can see what they are over production so too much stuff that doesn't get sold. That's waste, you know, it's too much produced inventory is too much inventory. And then the inventory waiting. Waiting on the docks not getting to the stores right, not getting to be sold that's waste because the more something wastes the older it gets and the less relevant it is to the product world generally.

Motion having something travel a lot of times. So you can really see the manufacturing influence in this. You know, if something has to travel six places but you could eliminate it and it only has to have three hand offs, you know, think about a relay. Tt the Olympics we were watching the relays this last week. And, you know, if you had six people in a relay it would be a lot slower than if you had four right, going around. It's the same concept.

And then transportation to and from something then re-work if it's not working well and then over processing the development of a product. So these are all part of the waste process. On the next slide then one of the things I wanted then to transition into is why you want to have stakeholders at the table. And I mentioned the fact that when you've designed a workflow you're really making the entire process potentially transparent. And you need to know that by the way because not everybody wants to have it all transparent all the time. And so there may be some things that aren't transparent or shouldn't be. And Stephanie is a master at saying let's put that on the parking lot. And sometimes you're going to need to do that but most of all the goal will be to make as much transparent as possible in the process.

The other thing I guess is that when people are at the table and they're designing the process they really feel like they're a part of the consultation of it and that they're part of consensus. We really use all of this now to build consensus among stakeholders and it really works well. I can tell you we had 35 people I think was the size of the room developing this transportation system for Vets. And it was really complicated and there were people that from the Department of Transportation that didn't believe in any of this and didn't want to be there and they were angry and crabby.

And really through our facilitation and modeling we got the group to really come to a decent doable click to call system that at least was a step forward right? It was an additional new phase of moving towards a fully blown decent transportation communication system. So it - maybe you don't get to exactly where, you know, where you want to go right away but you might make a baby step and that's important too.

So on the next slide so there are other reasons you want to do these workflow designs. You're going to appear more professional to the purchaser. If you have a business flow that you can say, "Oh do you want to know how this works? We've got workflows we can send you." I mean we've sent these all over the nation. We set them to advocates. We sent them to stakeholders and people, you know, I’ve had a lot of people call me about Return to Community. We helped something like 37 states learn about Return to Community and the first thing I do is I send our model, here’s how it works. And they can go through it and they can see it and it’s really clear to them.

You know, a lot of people work off of pictures. They don’t work off well off of text or books and that really helps. And of course we're able to reduce errors. Staff have more - far more predictability. When we train our staff we show them the business model. We take them out there and say here's how it works. And they're at the table when we design it.

In fact I think in two weeks we have a business process modeling session we're going to redesign return to community And all of the community living specialists are going to be there and they’re going to have input into it and they’re excited about it. Testing the process works much better and then of course you’re going to have a higher quality product which reduces your risk and reduces lawsuits. So these are all the reasons to do clear workflow designs and now I’m going to transition over to (Steph) who's going to talk about BPM 2.0 and how to put a model together.

Stephanie Minor: Great, thank you. So I’m going to start I won't read to you exactly what's on the slide about BPM 2.0 but I do want to point out a couple things for each bullet. and the first one you’ll see bullet business process modeling it talks really all about two players. There's the subject matter experts and the people who know modeling.

And while they say it's commonly that the team does the business process modeling of both people who know the modeling and people who know the subject I would say you have to have both people.

I had people who have tried to put together a model who have never done it before and we’ve had to have quite a bit of discussion about how to make that look a little nicer. And at the same time me if I don’t know a subject it’s hard for me to sit down and business process model something because I’m not going to have all the ins and outs of that process or the system or just the little quirks that happen. And so it may not come out as complete or as concise or as accurate as it needs to be so it's so important to have all of those players available.

I will say at times this is mainly for tools I think and databases. It talks about using event logs. It is possible to put together business process models that way but I think it’s so important to actually talk to people as well to see how do things really work because I know a lot of times if we haven't, if there’s processes that have been in place for years and we ask someone how it works and document that we're actually missing quite a few steps of things that people have done to make up for something that maybe doesn’t quite work quite right in the system. So that’s why it’s really important to make sure you have that face to face communication as well and that input by those subject matter experts.

So when we're using Business Process Modeling 2.0 a lot of times we are looking at specifically a process. We want it to be right. We want it to work for everyone. Obviously in most cases we're going to have more than more players than just ourselves. So we need to make sure that it works for everyone. So we want it to be efficient, we want to reduce costs and as Krista talked about the wait. We want to make sure that if I’m passing a document off to someone else who needs to do something with it that that is as efficient as possible and it’s not sitting somewhere and that person misses that. So it’s getting all of those pieces documented.

I will say as well too that having the management involved is so important and to have that buy-in. And I cannot tell you how many times sitting in a business process modeling session especially with these interested stakeholders as Krista called them having Krista there as well to help facilitate that process in addition to myself.

The other thing that happens with these BPM 2.0 is you can see that last bullet about leading to marketing and communications and training. When you have a process it’s so easy to go through and look at each step and say, "Oh, okay here’s what we're seeing that this person is going to get a letter, get a template. What is it going to actually look like or we're changing the process for this group of folks for example for preadmission screening hospitals are moving from a paper-based to an online system. How do we get that communication out to all the hospitals in Minnesota?"

And then also training. It was a new thing for staff as well as hospitals. So what are we going to do? Are we going to do videos? Are we going to do step by step? So looking at those pieces you can easily point those out. So going to the next slide one of the things that makes Business Process Modeling so easy to read as well is their symbols. And very simple symbols I will say you’ll see or you will see in a little bit it can get pretty complex. I don’t use all those when I do Business Process Modeling but there's really some main ones. So the first is an event. So you need to have a start and then an end to any process. That’s the biggest thing and that’s usually what we start with. We say to the group or if we sit down with Lauren and say okay if we're going to Business Process Model where does it start? Does it start with for example with the Senior LinkAge Line? Does it start with someone calling us or if you’re working with the county is the end process someone gets a support plan? So it’s really important that you have that start end date and then any expectations are there things that are going to come up in between?

There's also activities. So what’s the process of attack? These are the most important pieces. This is where you’re going to see the communications that need to come out, the marketing or the training or the changes to the tools that are needed so really documenting when do I document a call or when do I hand someone a piece of paper or when do I contact another person to help me assist a consumer for example? So it’s really important that all those processes and tacks are documented as well.

And then finally you’ll see the gateway. So this is where paths come together or apart. And we use what we call a decision point. So you’ll see that diamond shape in there. And that’s really to say okay, this can go two ways and I’ll talk a little bit of about Happy Path but this is really where we could say you know what? This could go either this way or this way. Or if I’m helping someone if they are a veteran I may take a different path and if they’re not. And then if they're a veteran and they're over 65 I'm going to take even a different path. So these decision points and these gateways are so important to help really streamline a process to show which way am I going to go or which way is the system going to go depending on the situation.

So going to the next slide this is an example of a process that was documented so you can see application handling. You’ll see the first diamond there is a decision point and also then you’ll see that blue staff checking for correctness. And then it goes to a diamond and it can be is the application correct? If it’s not which way is it going to go? Do we have to get the data? Do we have to send it back to the consumer?

And if the application is correct then in this case then you can do a new shipment. And then from that shipment then an invoice will be billed and then you can see there's a couple paths that happen here terms of an invoice going to the client and an invoice also being produced to send to the client. So you can see other symbols as well from when there are mailings, when there are emails, when there are things produced and then the endpoint.

So going to the next slide I will say I have been doing Business Process Modeling for years and even this overwhelms me. So there are many, many shapes out there that can be used. A lot of them are used to demonstrate technology. There are shapes if you want to distinguish communication from the electronics communications, do a physical mailing, do a face to face discussion so there are tons of symbols out there.

I keep it pretty basic when I do Business Process Modeling but know that the more advanced you get and how you use this whether it's for technology, whether it's for people there could be lots of symbols out there so this is just an example of what you may see.

So going to the next slide KISS. I don't know if everyone knows what this means but we go by Keep It Simple Stupid. I know that may sound kind of harsh but it's true. And one thing that I talked about that happy path earlier is that when you're going through especially when you have a group of stakeholders maybe everyone has a different opinion. I can tell you we have 87 counties in Minnesota and I guarantee you there's some processes they do 87 different ways.

So what is the main process? What's the happy path? What happens 80% of the time? Let's document that. And Krista talks about the parking lot. If - okay maybe this in a one in 1 million chance this could happen. Let's put that on a parking lot so we have it in our mind but we're not going to focus on it. Let’s keep it simple, keep it - let’s keep it going and get through the process of what’s really going to happen. So that's the main idea here. I’m going to turn it back over to Krista.

Krista Boston: So if you go to the next slide so what does this ultimately lead to? As Stephanie mentioned you’re going to have hopefully these swim lanes which we'll show you some samples here. And you’re going to be using the documentation to start producing stuff so that either leads to the product or is the product.

You know, for us the product is a person called the Community Living Specialist that goes out to somebody’s house and produces a community support plan. So not only is it a person visiting someone but it’s also the support plan and so there’s multiple products that, you know, we end up delivering with these in person services.

So it’s going to be business requirements that might change software. It’s going to be training for staff where they’re doing something differently or maybe they’re brand-new and they have to learn it.

And then it's going to lead to marketing. And part of what you learn from these business process models is who's your audience? Who’s your customer base and what is it that they need? And that’s really going to as you do the process models these stakeholders are going to help you get to that.

So on the next slide I’m just showing you what our license plate looks like because that’s just so exciting. But I wanted to point out that Minnesota really we say we're the land of 10,000 lakes but we also say we're the land of 10,000 services. And so we're like local control central. And so when you bring stakeholders the table you've got to a real large cross-section of people that represent the managed-care entities, the providers that bill them, the advocacy membership organizations that represent them . You've got to bring consumers obviously because they're the users of the product and you've got to bring government officials, the licensors the compliance people.

You know, I had a business process modeling session with where one of our compliance staff who's in charge of another agency was actually speaking quite negatively about our process and she was trying to advocate for these providers. And I had to stop over there on a break and whispered in her ear and say, "Hey what's going on here? You need to really do this outside this meeting." And she kind of stopped and started over and did a little bit better. And you know what? After that her and I have had the best relationship.

So, you know, you're going to have a lot of people at the table possibly depending on your service design or you may have very few depending on who's delivering it especially in states where it's just state employees that do all of the delivery of the services. What a different kind of thing. But we're all local control in Minnesota so we bring a lot of people to table.

So some examples of business process models on the next slides, we'll kind of go through them. So this first one is a new process model that we just did. It's fresh off the press. This is a business - so I'm time all style so hold the designation of Legal Services Developer for the state because we don't have a full-time person to do that and I've been doing it since 1998.

At one of the things we've been developing with our elder law section of the bar is a way for people to be - who have dementia will be transferred into the Senior LinkAge Line to a couple of designated staff that are available on our chat tool which if you're coming to the HCDS conference we're doing a session on that. We can show you that. But it’s a secure chat tool and they get a free 30 minute consultation with a lawyer. And then if, you know, the lawyer will tell them, "Here's the stuff, you know, based on your situation that I think you need. And you can use my services or you can use somebody else’s services." And they give them a list of lawyers that are available and send them off to the elder law section of the bar to find a referral.

And, you know, we’ve had several people take advantage of this and we just took it over from our University of St. Thomas Law School who had students that were taking these calls. And so this is the model that we put together. We had lawyers in the room. We were in the room. We had staff from the LinkAge Line, contact center staff and this is what it looks like. So again it can be super simple or it can be super complex.

Let’s go to the next one. And so this one is our pre-admission screening if you go to the next slide. Yes so there's pre-admission screening in Minnesota and you can see we’ve got a variety of different roles. And each of those rows are called a swim lane. And at the very top there's the Senior LinkAge Line and then it goes on down because the Senior LinkAge Line process is the Level 1 OBRA pre-admission screening request. So you can see the differences there.

If you go to the next one that’s the return to community protocol and you can see that we have to break them into different sections here. So here's process three of four process. So it’s a complicated one and it’s just you can see all the different tabs at the bottom and so each step of the process because these community living specialists work with these folks for up to five years and follow them. Well a quarterly follow-up is complicated and it's not going to sit on, you know, one small section of a model and so we had to do four different models so you can see that each step in the process may be its own model too.

And again the process itself kind of dictates what that's going to be. So the next one is care transitions referral to the Senior LinkAge Line. This is when hospitals make referrals into our form that we have online is also the pre-admission screening form.

And so we've modeled out what happens if the hospital wants to make a referral into us. And some of you may know that we're also the ship. And so hospitals can make referrals into us through this form to refer someone over for Medicare counseling. And so that's kind of part of this process. There are like five other things they make referrals into but you can see it all on the model. So Again it's just different kinds of things that we would use this process for that we're trying to show you.

The last thing I want to show you here I think is a sample is an activity diagram Example 5. And so an activity diagram is something that we use, we tend to use a lot for software if we're making any changes to our software. This kind of - it's kind of a logic decision tree model. It's similar to a business process model but it's not a business process. It's a process in a software and so it just kind of has a different framework. It's goes up and down and it's definitely a logic model.

So a Business Process Model is looking at all of the processes whereas this is looking at the logic decisions behind each section if this then that. And so we do a lot of activity diagrams too as well and we wanted to show you what that looks like. We're not really covering that too much today. But if you go Google that out on the Internet you'll be able to find it really easy.

Okay. Next slide when Business Process Modeling doesn't work well? Well we don't think it works well with really, really large groups. And I will tell you we've had 50, 60 in a room but a good 10, 15, 20 of those were area agency staff that were part of sort of us you know what I mean? It was the Board on Aging and the area agencies as the Aging Network at the table. And a lot of the area agencies were really quiet and they weren’t talking because they didn’t want to speak because they weren’t the advocates in the room. You know, they wanted to let the maybe the more charged stakeholders speak which was smart. You know, they needed to really kind of - they didn't need to argue that day, right? They needed to listen because they are developing the product.

And so what I would say to you is I would not use this for a group of 50. I’d use it for maybe a group of 25 to 30. If you have more than 50 I would start out with a World Cafe style and get some inputs or show the 50 the model that you did, walk them through it and then use the World Cafe style to get their feedback and input into the model. So that would be one way to handle that but I wouldn’t do super large groups.

Whenever the ideas don’t need to be specific and they're more policy oriented like you’re trying to decide whether to do an online tool or a tool that needs the following three steps, you know, that’s not really good for modeling. That’s a decision the people need to come together and, you know, debate and consider but it’s not a process so Business Process Modeling won't work well for that. On the next slide when you’re trying to decide who to bring to the table think about who is in the process, you know, users, consumers, clients. We call them consumers but I know for the disability world they don’t like that term so much but we think of them is, you know, people literally consuming our product in a - and we have to deliver for them.

Providers, staff delivering a product, leadership and decision-makers, associations lobbyists and advocates or legislators or governor’s office. We don’t get governor’s office and legislators too much to come but I think for some of you if you're in the Lieutenant Governor's office you may have some of these folks that really want to come. It just doesn't happen here so much. Okay the next slide…

Lauren Solkowski: Krista?

Krista Boston: Yes?

Lauren Solkowski: So before you move forward if we could just go back one slide if you could clarify by what you mean by World Cafe style?

Krista Boston: Oh there's a World Cafe process that we use where you have a group of people let's say seven tables, six tables. Why I said seven I don't know. That's like a magic number. And you have maybe six to eight people at each table. You give them a set of questions to discuss and you give them maybe 15 minutes. and you have a person at that table that's staying at that table the whole time taking down notes.

So it's the whole purpose is to gather feedback. So that goes for maybe I don't know half an hour to 45 minutes. and then that table gets up and moves and goes to the next table so they rotate. And then usually there's a new topic at the next table.

So you might have six topics. And then that group talks about it for, you know, another 45 minutes. And then they get up again and they rotate again and then they're now they're talking about new topic and they're - and this person who's taking the notes at the table is gathering all the feedback. And later the feedback is taken, consolidated, run and considered and reviewed by the policymakers.

It's very - it's a very effective model. I think it's probably easier to Google but that's a feedback strategy. You know, they used to do the voting with the little clickers. It's almost like that but there's a lot of discussion and people like to talk. You know, in Minnesota they love to talk. They want to be heard. And so the World Cafe model works really well for that. Does that help?

Lauren Solkowski: Yes absolutely. Thanks so much.

Krista Boston: Yes. Okay so let's see on the next slide I already talked about that. So here's what you need for a BPM event. You need the paper for the wall, you need the facilitators possibly two, some processing some to watch the audience. You're going to need scribes and reporters for the modeling. You're going to have to have people creating the Visio's at the side table. Usually we have one or two. If it's going fast you need two to keep up. And then you'll need a note taker that's taking notes hand written on the sides. So you need a good large number of people to make this happen to get all of the documentation.

On the next slide then the - you'll see the models get put into Visio. This is Microsoft Visio and pretty easy to use. You just grab the symbols put them on there, type it in. It's all very easy to use.

And you document the discussions. And then what we do is we send the Visio out for review in a PDF. We don't let them change it. They have to see what came out of the meeting. And then we go through the processes of getting their feedback.

We may very well have another meeting like a meeting part two where we go through the process and just step by step and say here's what you said. And I'll tell you when we were doing return to community we had several meetings. And they would change it all the time but not a lot. I mean but they had changes. And so you want to have that process, you know, integrity in the process so that they can make changes if they want.

I want to leave some time for questions but we send it out by email. Sometimes we go on the road and take it on the road. If you go a couple slides forward to Slide 31 you'll see what we've learned along the way. We think planners are good at this stuff and love it but planners don't always make good facilitators. You're going to have to have multiple roles. It takes discipline, consistency and (comity) to do this successfully.

People who want quick outcomes are going to get impatient and they might get frustrated early on but later they will be sold when they see it. They tend to be the outcomes oriented people in the room. But they'll be convinced when they see it has potential for better results.

People oriented individuals like the consensus building but they may need time to be convinced or to take it back and sell their coworkers or colleagues. So - and they might question if the right people in the room. So be thoughtful about who is present and then be willing to go and take it out to that other group later. And I've got some slides on here about that on the next slide I talk about going out and getting more feedback.

You may need to do a road show. We do a lot of roadshows. We take the models on the road. We go do eight sites across Minnesota and we literally show them the models and they love it. They love it because they can see what's going to change. So I will stop there to leave some time for questions hopefully.

Lauren Solkowski: Great thank you. Okay so operator if you could now please provide instructions for asking a question through the phone that would be great?

Coordinator: We'll now begin the question and answers. If you would like to ask a question please press Star 1, please unmute your phone and record your name clearly when prompted. Name as required to introduce your question. To withdraw your request press Star 2, one moment please for your first question.

Lauren Solkowski: Okay thank you. And I'm checking back. We haven't had a questions on the chat as of yet but they tend to roll in once we give folks to sort of time to process.

Coordinator: Again if you'd like to ask a question on the phone lines please press Star 1 and please record your name clearly when prompted.

Lauren Solkowski: And also so - I don't know Krista if you wanted to I had thought about the attachment that you had shared some of the sample documents. I didn't know if there was any…

Krista Boston: And so we gave some meeting samples of a meeting notice. We actually sent the models out in large scale form so you can see what they look like. Some of you to work with Medicare I will - I was just thinking we just finished a modeling of the entire Medicare appeals process from us to CMS and back. And it is a huge model.

Lauren Solkowski: Wow.

Krista Boston: So if anybody ever wants to see that we can send them. So yes there's a lot of information for you there. You can see what a model looks like. You can take it and use it if you want to do the development of your own product. And maybe I can throw a question out now, you know, is anybody doing this now or is there anything that you've learned that you would want to share with us?

I mean we're always willing to learn about new processes or do you think that this has applicability as you're - because I think you're all developing products that you're going to maybe try to sell to health plans if I'm correct right or something like that?

Lauren Solkowski: Okay. And so while we wait for people to chime in in response to that we do have a couple of questions that have come in. First is if you could explain how you have used this process with possibly with healthcare providers and payers or if you have and if so what the response has been?

Krista Boston: Okay so managed care was definitely in the room at the return to community. They were in the room at the PASRR because they also - they actually do the preadmission screening themselves. And they didn't want us to take it over they wanted to retain that because once somebody goes into a nursing home there is a nursing home penalty that they have to pay if somebody stays in longer than I think it's 180 days. So they – their per member per month goes down if they stay too long. So they want to keep that PASRR process. They want to hold onto that. And so they were at the table from the beginning to the end in designing that.

We also had them at the table for we helped do the money follows the person business process model with the health plan staff. It includes the care coordinators and then it was also the administrators of the health plan. And they were at the table and did the whole business process modeling session with us.

So the one thing I'm thinking about none of those ever had had us selling - trying to create a product that we might sell to them. I know that that's something you're thinking about. One of the things I would do is try to find some champions that you have that are already inside those agencies and tell them that you're may be interested in a product testing approach and would they be able to be a part of the product design because, you know, you'd really want their input. That might be a way to approach that so I don't know if that helps but…

Lauren Solkowski: No, no it definitely does. Thank you. Okay before we go on to these other ones are there any questions on the phone?

Coordinator: I am showing no questions from the phone lines.

Lauren Solkowski: Okay. So another question is if you are aware of any resources for getting more training in Lean?

Krista Boston: Well the state of Minnesota does Lean training for its state employees. I would look around and see if your states got somebody like that available. It's in our Department of Administration. Most of the states are doing some sort of performance management function now somewhere. And so you might look for that like performance management or you might – it's s probably not going to be in your Department of Human Services are Department of Health it's going to be somewhere else kind of hidden that, you know, originally it came out of our Department of Management and Budget. So go and try to find those people if you can and then see what they suggest.

We also have a group here called Watermark. I think they might be national. I'm not sure. But there's something like that out there. And we actually just brought them in to train my entire team on how to develop use case. Use cases are for software. And I've sent my staff to go get BPM 2.0 training through Watermark. So that's definitely an option too. You know, Lean itself there's a ton of options for training out in the Internet. But if you can get it through one of your state agencies I would do that. I'd start there.

Lauren Solkowski: Great. That's very helpful. And then another question here is asking if you're familiar with any software applications beyond Visio that is interactive between users to make edits and track changes in real-time?

Stephanie Minor: Oh gosh. You know, we're big Visio users. You could probably use some sort of Google drive Google product. You could probably use something there. But nothing - I mean okay I won't say that that's not true. There are business process modeling tools online that allow joint kind of changes of the document but I don't know that I would want to lose control of that myself. I'd want to keep control of that so I would never send out a document that isn't in a PDF form. So unless you really hate Visio I guess we would recommend it.

Lauren Solkowski: Okay. And now I'll go back to the operator and see if any questions have come in.

Coordinator: I still am showing no questions.

Lauren Solkowski: Okay. Okay at this point so that's all of the questions that we had in our - in the chat. I will give it another minute or so before - to see if there's any lingering thoughts or questions.

Krista Boston: The one thing I would say is you've got our email at the end on the last slide. If you have any follow-up questions please feel free to throw them out to us. We don't mind fielding those questions. Frankly Stephanie has done modeling all over the place. Her and I were deployed to MNsure which is our state health exchange and we got that call center up and running. And we did a ton of modeling with the health plan - actually now that I think about it, it was with the health plan. It was a very political very loaded. But again we weren't selling a product we were more building consensus with them. So…

Stephanie Minor: Right.

Krista Boston: …always feel free to email us.

Lauren Solkowski: Thank you so much for that. And actually we just had another one come in. So it's asking if you're I guess familiar with On the Mend: Revolutionizing Healthcare to Save Lives and Transform the Industry and if you found that helpful?

Krista Boston: What's it called?

Lauren Solkowski: Okay. So it says it's On the Mend: Revolutionizing Healthcare to Save Lives and Transform the Industry.

Krista Boston: Well I have not heard of it. But I'm googling it right now just to see what it is. And you have that East Coast on the mend. That was really what I - okay…

Lauren Solkowski: Sorry…

Krista Boston: No it's all right. It made me laugh. Oh so this looks like this is maybe some people that are trying to - well one of things about the healthcare industry if we can go over a little bit is we have always maintained here that we cannot - that one of the problems with healthcare is healthcare has no predictability. It can't figure out what it costs. And it doesn't have a good clear model of what it delivers.

And that's interesting to me. And so it looks like this is an attempt by a couple of physicians to say hey you need to use Lean techniques to do this. It's a very interesting book. I think it would be fascinating to try to get a read on this yes. And I would buy this book and read it, it looks good. But healthcare has a problem. Nobody knows what is really delivering. It's kind of hidden and not very transparent.

Lauren Solkowski: Right, right. Okay let's - so I'll just check one more time well let's see. Okay I think that's it. So I just wanted to thank Krista and Stephanie again for joining us today and taking the time to present with us - it was - I found it extremely informative and just thank you again for all of the participants on the phone, the all of the slides, and the attachments that we talked about earlier were sent out prior to the Webinar so you have those and if again if you have any other questions following the Webinar please don't hesitate to reach out to myself, or to Krista or to Stephanie. Their email addresses are on the last slide of the slide deck. So thank you both again so much.

Krista Boston: Thank you.

Lauren Solkowski: Thank you. And thanks to everyone for joining us. And please enjoy the rest of your day. That will conclude our Webinar.

Coordinator: Thank you for joining in today's conference call. You may disconnect at this time.

END