



## Practice Advancement Program

### Execution Workshop The Ideal PROCESS

#### Workshop Description

Create an organizational structure to contain process documentation, explore & share your experience around software solutions designed to manage workflow, and learn the key factors required to develop and maintain a powerful catalog of processes to deploy in your practice.

#### Syllabus

##### Week 1: Introduction to Process Manuals and Workflow Management Systems

- Overview of process manuals and their importance
- Understanding the audience and purpose of the manual
- Identifying the key components of a process manual
- Best practices for creating effective process manuals
- Introduction to workflow management systems and their benefits
- Evaluating the organization's current workflow systems and identifying areas for improvement
- Selection criteria for choosing the right workflow management system for the organization

##### Week 2: Defining Processes and Mapping Them Out

- Identifying the processes to be documented and defining their scope
- Mapping out the steps and decision points in each process
- Gathering feedback from process owners and stakeholders

##### Week 3: Writing the Manual

- Structuring the manual and organizing the content
- Developing clear and concise instructions for each process
- Incorporating visual aids, such as diagrams and flowcharts
- Ensuring consistency and accuracy in language and formatting

##### Week 4: Review and Maintenance

- Conducting a thorough review of the manual for accuracy and completeness
- Establishing a process for ongoing maintenance and updates
- Incorporating feedback from users and stakeholders
- Integrating the workflow management system with the process manual

\*PREREQUISITES: This workshop is available to Advantage and Premium members who have completed the 10-week Ideal Practice Course.