Set your operational excellence compass heading

Decide how triaging workshops support your management philosophy. It easy and almost trite to say you are committed to continuously improving your business. Who isn’t? But actually empowering your front-line experts, who perform your critical processes, to offer and lead improvement changes with your money requires a lot of mutual respect and trust. That respect and trust comes from a shared situational awareness of how a critical process is performing relative to your business objectives. Process Triage delivers that situational awareness and presents your expert team an opportunity to show you where and why the process’s design or execution must change, including the size and priority of such changes. If you want tactical improvements to be identified and driven with bottoms-up buy-in, the Process Triage approach is a perfect fit for you.

Decide how much authority you want to delegate to the triage team. The Process Triage protocol requires you delegate some things. By simply selecting a triage team member, you grant them the privilege of defining what the process is for triaging purposes, including describing its performance capabilities. You grant them the gravitas to say what hinders your objectives in pointing out points-of-pain. You trust them with sizing and scoping the action items and projects that will remove these point-of-pain. You’re trusting their judgment when they rank and prioritize these proposals. Executive Sponsors understand this and typically welcome this sort of empowerment.

When it comes to assigning and scheduling these proposals for completion within the next 90-days however, they are now allocating resources. That resource allocation is a different kind of delegation that takes on management responsibility. You have three choices:

- **Low delegation**: Do not attempt to assign or schedule the ranked proposals. As long as you support their highest priority proposals, or explain why you cannot in compelling, fact-based terms, but do support others, your triaging will serve you well.

- **Medium delegation**: Allow them to assign and schedule the ranked proposals, stipulating will receive these as a recommendation - good staff work, but are not bound by them. You will certainly support what fits in your portfolio of responsibilities and discretionary budgets.

- **High Delegation**: Have them assign and schedule the triaged proposals, grant them budget guidance and assign the necessary staff work time to refine and confirm the triage ranking and
assignment results. Approve their completed staff worked proposals. This is essentially empowering a self-managed team.

**Reserve enough budget to support the triage results.** The Process Triage workshop delivers a prioritized stack improvement proposals in two sizes; a one or two person, action-item size *Small Now* and a larger team effort, project-sized *Big Now*. They are forced ranked by their highest value to your customer, your financial bottom line, and your personally stated strategic direction.

Regardless of whether or not you let them assign and schedule the proposals (see the previous discussion point), it is absolutely essential you back their highest value proposals with real, budgeted resources. The risk of conducting a triage session that requests they tell you what to focus on and then you not to support it will destroy the team’s willingness to offer suggestions in the future.

**Decide how you’ll use Small & Big Now assignments for staff development.** The prioritized list of improvement proposals are excellent task assignments for developing your staff. Consider pairing up a younger high-potential employee with a seasoned “triaging-grade” expert to grow their skills and honor your triage team members.

**Always observe the second half of triage sessions.** Assuming you have a subordinate serving as the triage session’s *Process Triage Host*, this host will come to you to resources any opportunities the triagers don’t have bandwidth for. You’ll understand the context when your host delivers a completed business case.

A process triage session is a skip-level team meeting that is entirely focused on understanding how to implement your objectives. The triage’s first half does not have any deliverables you could not be briefed on by the team leader in much less time. The second-half work of identifying points-of-pain and sizing their solutions sharpens your situational awareness regarding people, process and technologies.

**Schedule follow-up progress reviews.** The more you pay attention to triaged proposals, the more devoted your triage teams will be to delivering your objectives. When they see you’re maintaining your focus, they’ll maintain theirs.

**Publicly announce triage-driven resource allocations or policy changes.** When your triage team sees you publically support their triaged recommendations with real budgets or policy changes, you solidify their confidence and professional trust in you. By doing so you demonstrated your confidence in them to take fact-based risks on your compass heading.

**Publicly celebrate triaged proposal accomplishments.** When you celebrate a proposed improvement’s completion that came the triage session, the informal leaders who comprised your triage team will, themselves, gain more respect and confidence and deliver higher levels of performance.

Process Triaging does not fix things, it finds what to fix next. It improves situational awareness for a moment - which is good, but its value is how it focuses your team to fix the right thing first.