BEGINNER'S JOURNEY

WHAT TO EXPECT

What to expect will depend upon:

- What role will you play in your process improvement project.
  Are you the executive director, a project team member, a staff member directly impacted by any changes that will be made, a staff member indirectly impacted by any changes that will be made?
- The size and complexity of the process itself
  Is it small in scope or is it large in scope? Is it how the phone gets answered or is it the entire intake or case acceptance process?
- The culture of the program,
  how collaborative is it, how adaptable is it, how risk averse is it, how innovative is it?
- The wild card:
  This is legal aid after all. There could be a natural disaster or pandemic, funding shifts, case management system conversation, leadership transition, technology meltdowns.

These are the elements that will generally determine how long and involved the project will be. It could take weeks. It could take months. And every project will be different because every projects' elements will differ.

The best ways to know what to expect?

- ✓ Talk to other legal aid programs who have done a process improvement project about what they experienced, what they learned and what they would have done differently.
- ✓ Do your first project!!!

> *The good news is that process improvement uses proven methodologies*
> *that have long provided measurable benefits for*
> *businesses, law firms, nonprofits, and legal aid programs*

The basic steps in process improvement--regardless of approach, tools or tactic--generally involve these 5 activities

Initiate: Align & Commit

- Commit to doing process improvement and be clear about the purpose for doing it

- Identify the internal and external "stakeholders"
- Align around the approach to be used and acquire a basic understanding of it
- Make sure you have a program wide perspective, then put together and orient the project team
- Scope the Project and Develop your Project charter

Inquire: Understand the current or "as-is" state of the process

- Map the current process,
- identify the pain points,
- determine which among them are priorities in addressing
- Ferret out the root cause of the pain points you have chosen
- Look for the data you already have and determine the data you need to have for baseline metrics to measure progress.

Imagine: What is possible?

- Brainstorm solutions (make sure they address the root cause of the problem, not its symptoms)
- Develop a new process design and map it out
- Insure you have stakeholder understanding and support outside of the project team and program leadership

Innovation: Create the future

- Look at the process you have designed and consider your return on investment would be. Are the benefits the program and/or its clients will receive worth the cost and effort it will take?
- Communicate with internal and external stakeholders before initiating implementation.

Implementation: Actualize the Innovation

- Plan the Implementation Project and communicate about it
- Pilot the Process. Make the changes for an agreed upon period of time and observe, measure, and get feedback on how it works.
- Improve the process design by making the tweaks you need to make in real life and test some more.
- This is a good time to engage stakeholders. Get feedback on what you are imagining, invite them on to workgroups or to help testing.