



Affinity News

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Greetings:

Welcome to the mid-year issue of Affinity News. July seems to be a time to reflect and a time to anticipate. While I won't be quoting Ecclesiastes, Chapter 3 here, it does seem to fit this pivotal point of the year. Some of us are wrapping up the fiscal year ended June 30, some are anticipating the creativity born of well earned time away. And some of us are just wondering how many creatures we'll feed before we enjoy the fruits of our gardens!

I hope you will find the feature story worthy of some reflection. "Creating Ownership" tells of a time when I had an opportunity to take a fresh look at a situation no one was happy with. While the story touches on business process re-engineering, performance measurement, delegation of authority, blah, blah, blah, ... it really is about what happens when good people bring their best to the table.

I hope you have a wonderful remainder of the summer and can take some time to savor the gifts around you.

Mission, Methods & Tools:

The mission of Affinity By Design, LLC is to help organizations meet their goals by overcoming obstacles. The method for accomplishing this mission is the intentional bringing together of a community of people to pursue a common interest based upon mutual trust and understanding. The primary tools

employed by Affinity By Design, LLC are founded in the disciplines of group facilitation, Systems Theory and project management.

Feature: Creating Ownership:

Part of my role as the Finance Manager at Wisconsin Independent Physicians Group (WIPG) included direction of the physician credentialing process. On my first day of work at WIPG I found the credentialing process was a mess. There were stacks of files awaiting my review and more stacks of partially completed files. I also learned that the Credential Review Committee of the Board of Directors was very dissatisfied with the quality of information being presented for their approval.

I knew this process was not going to improve significantly until we addressed issues of quality, productivity, and accountability. I also knew, the staff that was working with the process was far better equipped to determine the quality of their work than I was.

I focused my attention on developing an environment where the Credentialing staff could be successful. One of the first things we did was to assign each physician file to a member of the Credentialing team. All aspects of the credentialing process, including quality control, were in the hands of the person assigned the file. I worked closely with the team to redesign the computer system they used to allow for better tracking of the credentialing process. Soon, each of the team members could easily identify when tasks started and ended, open tasks and tasks that were incomplete. At the same time, I analyzed aggregate times for all process steps and was able to provide the team with an understanding of how they were performing as a team and as individuals. This information included both historical experience and projected productivity targets for the coming months.

I was very happy with the results of our efforts. The team took ownership of their own work, and I got out of the day-to-day processing of physician files. The team took pride in their work and the quality improvement was significant. By working more effectively, the team was able to eliminate the backlog that existed when I started the job.

Lessons Learned:

The most important lesson learned in the redesign of the physician credentialing process is ownership can't be created, only accepted. I was fortunate to have a

staff willing to accept ownership of their own work. I merely facilitated the process.

One of the biggest challenges was making the process more tangible. "Credentialing" is a fancy term for reviewing a whole bunch of information from a whole bunch of places. We all felt a sense of frustration from not having a way to measure the progress of files as they moved through the credentialing process. With as many as 100 files in process at a time, the question "How are things going?" rarely resulted in a quantifiable answer.

As we gained an understanding of the various parts of the credentialing process, a consensus developed regarding significant performance measures. The key to this consensus was dialogue. The value and purpose of each performance measure was understood by the group.

The staff was more than willing to meet the challenges of the work before them. I found my role changed from quality inspector and staff supervisor to that of change agent and coach.

Applying The Lessons:

Creating ownership of the credentialing process was a process in itself. Here are a few of the main points of the process. They can be applied to many other situations.

- Assign responsibility: Each file was assigned to a staff member. This allowed for both accountability and appropriate acknowledgement of a job well done.
- Document the process: Identifying significant tasks made the entire process more transparent. The number of complete, and incomplete, tasks could easily be calculated. Measuring the amount of time each task required made it easy to determine if a staff member was getting behind in their work.
- Identify authority: Many parts of the credentialing process involved requests for information from other organizations. Knowing what tasks were within/outside the staff's control clarified questions of responsibility.
- Enable self-monitoring: I created a set of reports for monitoring the work done by the credentialing staff. These reports were available for the staff to run whenever they wanted. Meetings with the staff had little drama since all information was available to everyone, at any time.

Add your comments:

The story above has been published on the Affinity By Design blog. You can become a part of the story by going to: < <http://affinitybd.blogspot.com/>>. You'll also find web-only content there.

How Affinity By Design, LLC can help:

Is it time to do some analysis of what's effective and what's not? This would be a great time to look at how your organization can bring its best to the table. You might be surprised at what you'd find. You'll also be surprised at how Affinity By Design LLC can help.

Dan Lococo brings many years of experience in business process analysis, finance management, and group facilitation to Affinity By Design, LLC.

There are a number of ways your organization can take advantage of these skills and experience as it becomes more effective in the delivery of its mission.

- ✓ Group presentations: As an experienced public speaker, Dan Lococo can address your organization or professional association.
- ✓ Structured brainstorming: A facilitated brainstorming session can help your organization reach a consensus on how to measure what is most important.
- ✓ Model building: A business model can quickly and effectively communicate important information. The integration of analysis tools and graphics allows for the communication of sophisticated information with a minimum of data collection.
- ✓ General consulting: Affinity By Design, LLC can provide a customized combination of facilitation, analysis and consultation to meet the special needs of your organization. General consulting engagements are based upon a mutually agreed upon project charter.

Why You Received This Message:

You have received this newsletter because I have had either direct, or indirect, contact with you regarding the work of Affinity By Design, LLC. If you do not want to receive this newsletter, please let me know via e-mail. Include the words "Take me off your list" either in the subject or body of the message.
