

# Workflow Foundations Working Session

## Sample Agenda



Time Block	Session Focus	6-Hour Intensive Format (Virtual or In-Person)
9:00 - 9:30 AM	<u>Welcome &amp; Goal-Setting.</u>	Outcomes + success criteria (what “better” looks like)
9:30 - 10:45 AM	<u>Audit &amp; Strategy Discussion</u>	Current State Review + bottleneck diagnosis (handoffs, approvals, source of truth)
10:45 - 11:00 AM	<b><u>Break</u></b>	<b><u>Break</u></b>
11:00 - 12:15 PM	<u>Solution Mapping.</u>	Future State Design (workflow stages + roles + decision points)
12:15 - 1:00 PM	<u>Lunch Break (Offline Work).</u>	Reflection
1:00 - 2:15 PM	<u>Workflow Demonstration &amp; Implementation Plan</u>	Implementation architecture (intake, templates, reporting, governance)
2:15 - 2:30 PM	<b><u>Break</u></b>	<b><u>Break</u></b>
2:30 - 3:30 PM	<u>Q&amp;A &amp; Next Steps</u>	Adoption plan (role-based training needs + rollout sequencing)
3:30 - 4:00 PM	<u>Wrap-Up &amp; Optional Support Discussion</u>	Confirm priorities for Weeks 4–6 + next steps