Getting Everyone to the Table – Cross Functional Cycles

How many times have you been sitting in a meeting discussing a process or how information flows through the organization, when you realize you don't have all the right people around the table to pursue a conversation? When it comes to Cross Functional Cycles, you cannot afford to have departments working in silos. How can you identify all the team members that need to be present? Over the years while working in Project Management, I have developed a methodology of getting everyone to the table.

One of the first areas that you need to identify is who is affected by the project. You want to start and look at the corporate structure first. For this article, I am going to use a full HIS Project (Hospital Information System) as my example. Looking at your organization, are there multiple hospitals that are affected. What about Long Term Care or Assisted Living. Do you have Physician Offices as part of your corporate structure that will be impacted? For this exercise, I am going to say we have:

- One Acute Care Hospital
- One Long Term Care Facility
- One Assisted Living Facility
- 10 Physician Clinics

Next, you want to identify the Cross Functional Cycles. As I stated earlier, for this exercise I am going to use a full HIS Project, so my Cross Functional Cycles are going to have to be higher level. If you were just implementing a HR/PR system, you may want to be more granular. There are seven standard cross functional cycles in every HIS project that I like to include. They are:

- Revenue Cycle
- Human Resource Cycle
- Clinical Documentation
- Executive Support
- Patient Orders
- General Financials
- Quality/Patient Safety

The next step involves mapping these two lists together into a matrix. I added some details to help describe what each cycle is. Not everyone may know what these cycles are. For example, the Revenue Cycle is

Cross Functional Cycles	Acute Care	Sub-Acute Care	Assisted Living	Clinics
Revenue Cycle Sch, Eling, Reg, MR/Coding, Billing	✔	✔		✔
Patient Orders OE, MM, POM	✔	✔		✔
Human Resource Cycle Recruit, Hire, T&A, PR, Evals, Terms	✔	✔	✔	✔
General Financials GL, AP, MM, Billing, PP	✔	✔	✔	✔
Clinical Documentation Nursing, Clinician, Physician	✔	✔		✔
Quality/Patient Safety QR, PS, IC, PCS	✔	✔		✔
Executive Support ESS, DR	✔	✔	✔	✔

made up of scheduling, eligibility, registration, medical records/coding, and billing. Each of the check off marks indicates which corporate entities are affected by the specific cycles.

Now we need to drill down to the department level of each corporate entity. For this example, I have added the most common departments. You could have more or less depending on your organization. Remember, we want to keep the corporate entity intact, so we are going to move it under the cycle. If the cycle goes across all corporate entities, you can simply put "All". For example, the Human Resource Cycle or the General Financial would go across all corporate entities. Here is what it should look like:

Cross Functional Cycles		Nur	Phy	Rad	Lab	Pha	MR	Reh	Pur	Reg	Bil	Fin	MM	AP	QA	HR	PP	FAC	Exe	IS
Revenue Cycle CWS, Elig, ADM , HIM/Coding, BAR	Acute Care			✔	✔	✔	✔	✔		✔	✔	✔								
	Sub-Acute Care	✔					✔			✔	✔	✔								
	Clinic	✔					✔			✔	✔									
	Assisted Living																			
Patient Orders OE, MM, POM	Acute Care	✔	✔	✔	✔	✔	✔	✔	✔		✔	✔	✔	✔	✔			✔		
	Sub-Acute Care	✔	✔	✔	✔		✔	✔	✔		✔	✔	✔	✔						
	Clinic	✔	✔	✔	✔			✔	✔		✔	✔	✔	✔						
	Assisted Living			✔	✔			✔												
Human Resource Cycle HR, PR,	All	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
General Financials GL, AP, MM, BAR, PP	All	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
Clinical Documentation PCS, POM, ORM, LTC, EDM	Acute Care	✔	✔	✔		✔	✔	✔			✔				✔					
	Sub-Acute Care	✔	✔					✔			✔									
Quality/Patient Safety QR, PS, IC, PCS, ORM, POM, EDM	Acute Care	✔	✔	✔	✔	✔	✔					✔			✔				✔	
Executive Support ESS, DR	All											✔							✔	

Again, the check mark indicates the cycle affects this department under the corporate entity. Obviously, every organization is different and what I have may not represent your organization. At this stage, the exercise is based upon your assumption.

Which leads us to our next step, we need to move past assumptions and do some investigation. You will want to contact the management of these areas and verify that your assumption is correct. In your conversation, you need to identify the person or the person who can represent the people involved in the cycle. Once you have establish your list of people involved in the process, you need to now contact these people and verify that they are still involved in the process. I know this sounds time consuming; however, I have found that this is where things start break down. This extra step will save you many hours later. You will either find the information is correct or that the person is no longer doing it. Usually, I have found that they know who is now working on that process only because they trained them.

Getting Everyone to the Table – Cross Functional Cycles

You are ready to schedule for your first meeting now that you have identified the participants. However, your discussion should be centered around the amount of impact to the department the cycle has on the department. For example, we are going to use General Financial Cycle and specifically Material Management and Accounts Payable. For this exercise, I have been identified as a person who has involvement in the MM/AP cycle. I generate POs and I submit invoices for Payment. I am affected by this process. However, if I work in the OR, I can have surgical cases where patient safety and revenue is impacted by getting the correct instruments ordered via preference cards. I am now impacted by the process. You will want to change the check marks to either A for affected or I for impacted. It should look like the following:

Cross Functional Cycles		Nur	Phy	Rad	Lab	Pha	MR	Reh	Reg	Bil	Fin	MM	AP	QA	HR	PP	FAC	Exe	IS
General Financials GL, AP, MM, BAR, PP	All	I	A	I	I	I	A	I	A	I	A	I	I	A	A	A	A	A	A

You are probably thinking, "Why am I going through all of this?" There are several reasons to go through all this trouble:

- You now know who your major stakes holders are- those who are impacted.
- You can determine those who need to be at every meeting versus those as invited guest. As your meetings progress, you may want to invite those affected to only the meetings that apply to them.
- You now have a starting point to jump into the cycle with the correct people around the table.