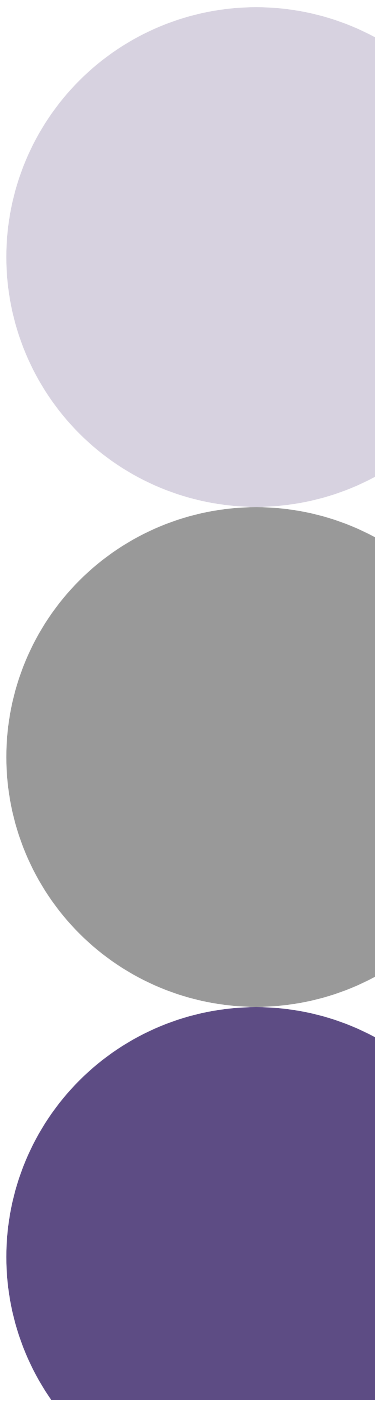


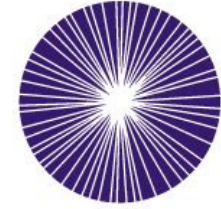
AMERICAN ACADEMY
OF OPHTHALMOLOGY®

Internal IT Process Strategy

Nov '24 - May '25



Project Overview



AMERICAN ACADEMY™
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The American Association of Ophthalmology's IT department requested CREATE Strategy to work with them to take a collaborative approach to uncover and organize their **complex ecosystem**. The AAO IT and CREATE Strategy teams worked to identify and improve the way IT engages with internal stakeholders by evaluating their stakeholder-facing processes and identifying areas of opportunity. By the end of this project, Academy IT will be able provide a scalable, repeatable process that helps guide the identification and development of solutions for the future.

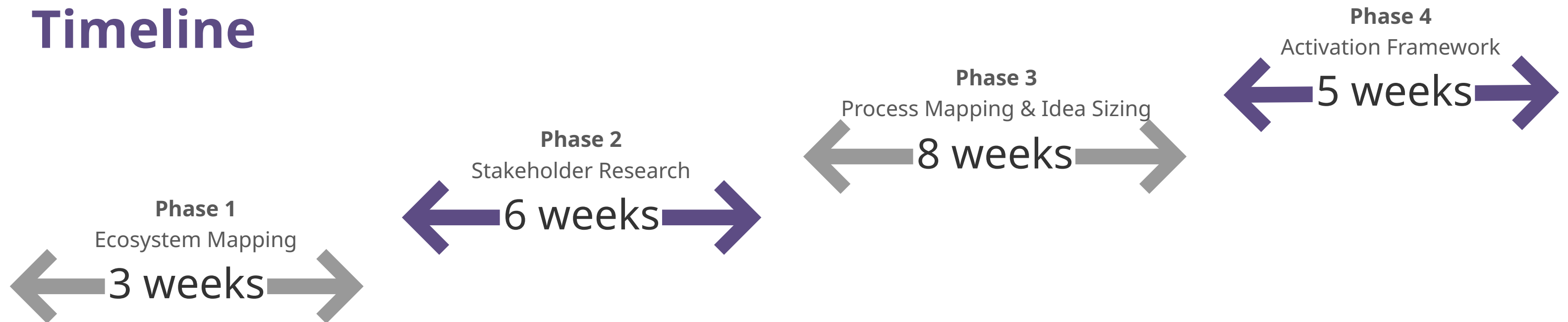
Project Scope

AAO wanted to complete a detailed service design evaluation of their current IT process, gather insights and opportunities for improvements and build out those improvements, while also learning a robust design process that that can be repeated yearly/bi-yearly.

Objectives

1. **Understand the current AAO landscape and IT processes** (Phase 1 & 2)
2. **Map the IT process visually to identify improvement opportunities** (Phase 3)
3. **Define a clear action plan for process improvements** (Phase 4)
4. **Establish capabilities and repeatable process the IT team can use** (Ongoing)

Timeline



Phase 1

Nov '24 - Dec '24

Objective:

Understand and align the IT team around the current AAO landscape.

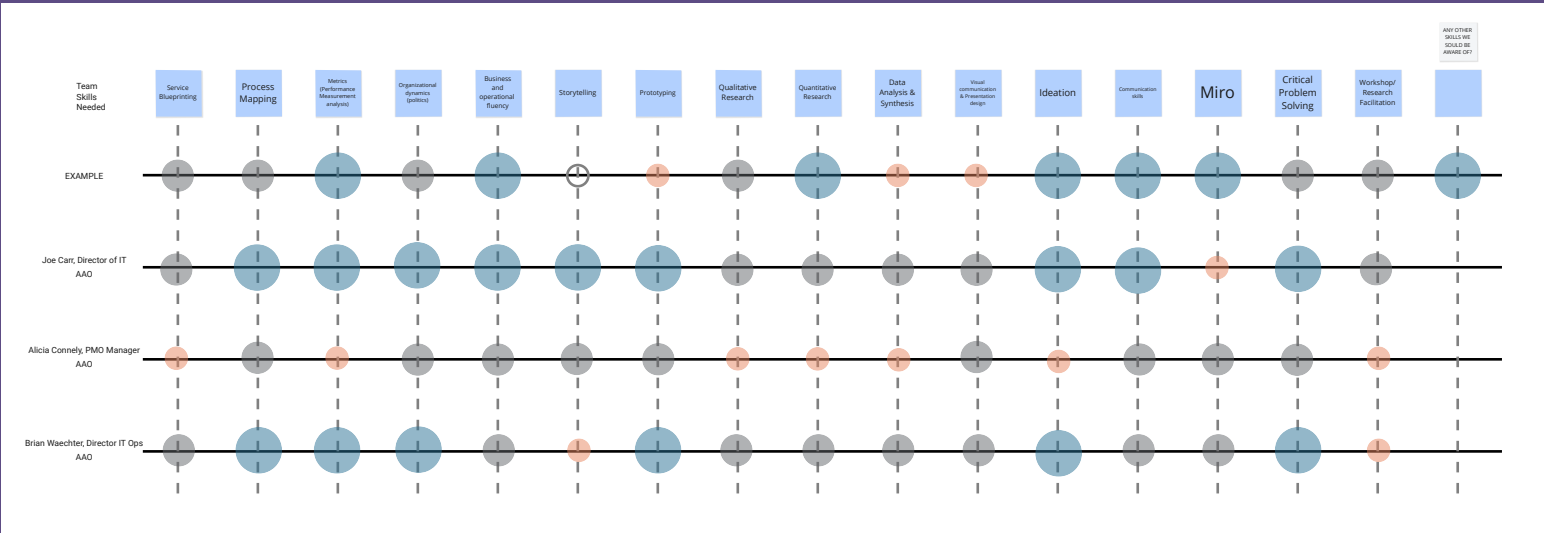


Landscape and Opportunities

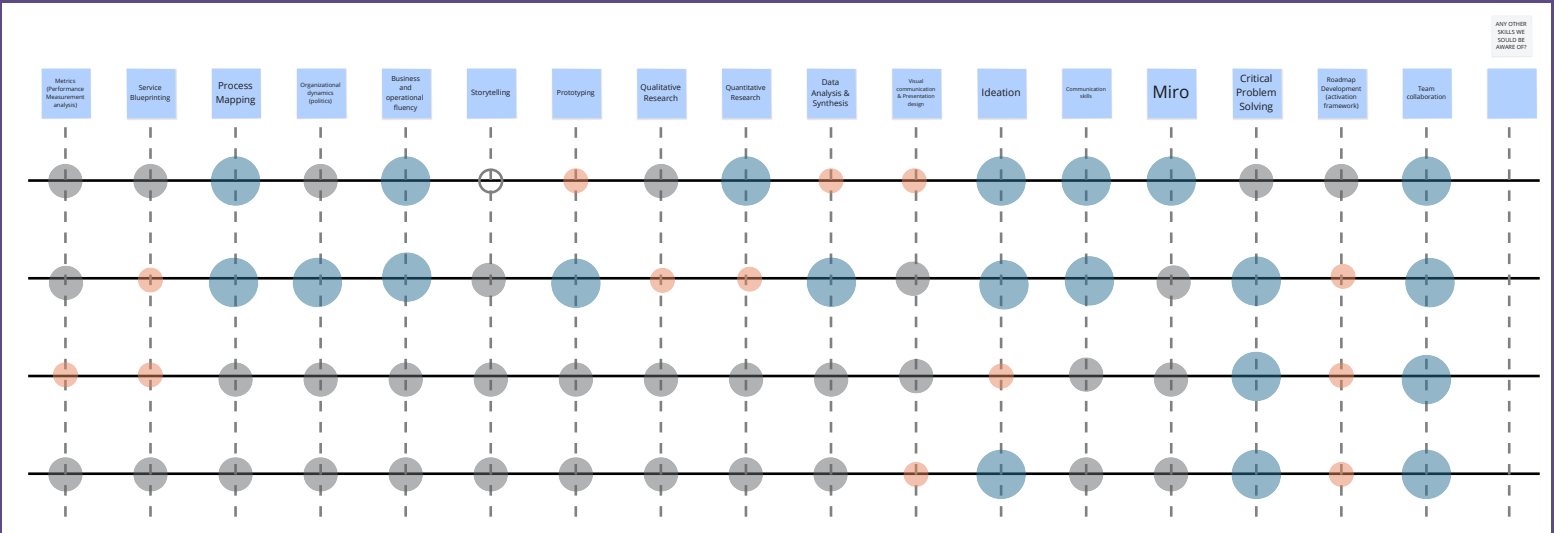
Skills Assessment

The capability model helped document how much was learned throughout this project. Assessing the team's capabilities at the start and end of the project gave us insight into the teams' knowledge and skill growth.

Starting Capability Model



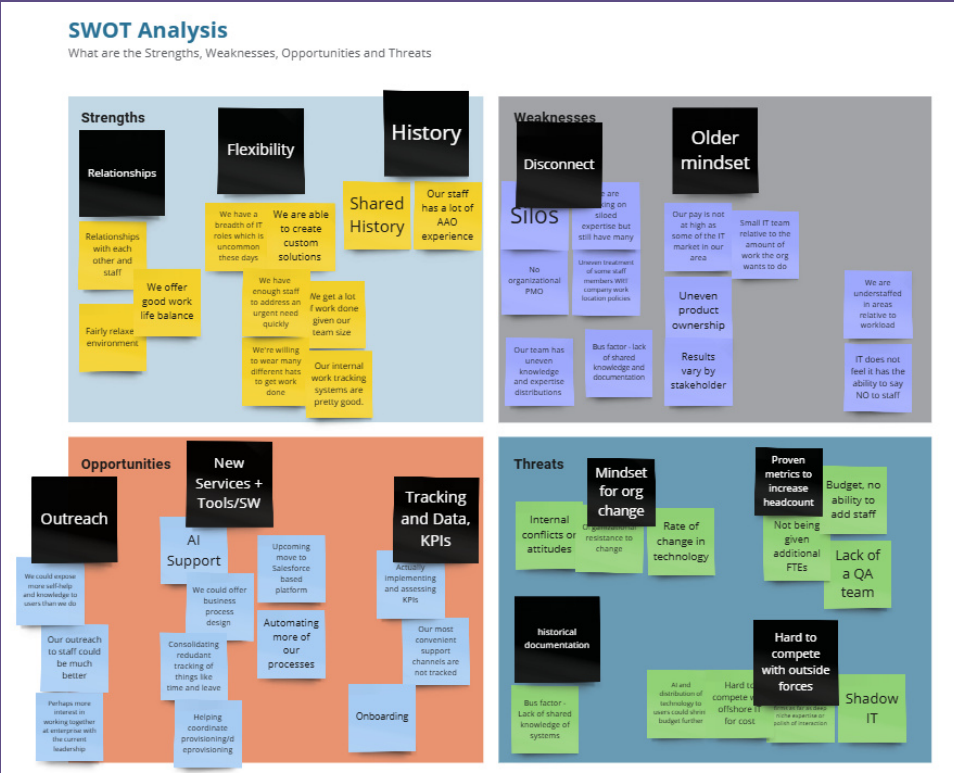
Ending Capability Model



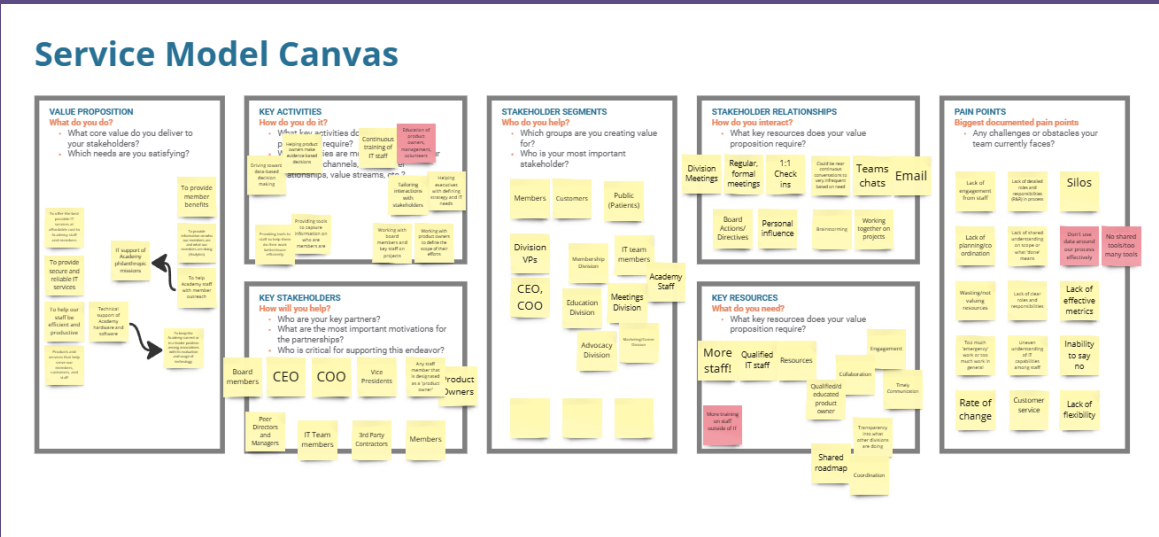
Vision & Strategy

The team kickedoff by using the SWOT and Service Model Canvas frameworks to outline the business structure, key strengths, weaknesses, and opportunities. These tools provided a clear baseline and aligned the team on the project’s purpose—ensuring a shared understanding of the organization’s vision, strategy, and its impact on IT. This process also sparked valuable discussions on potential challenges the team could address.

SWOT



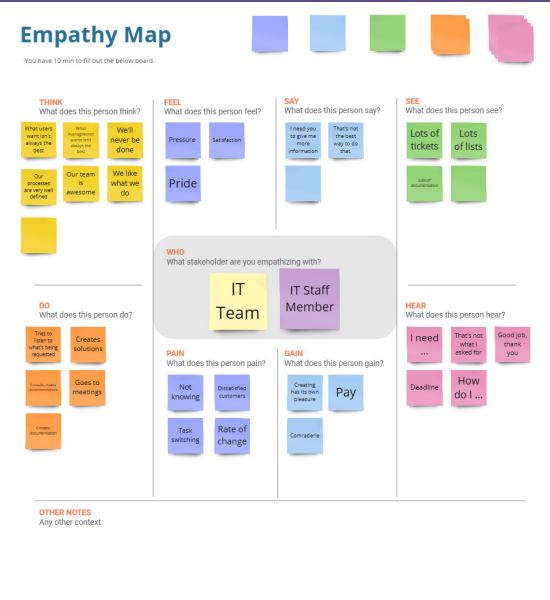
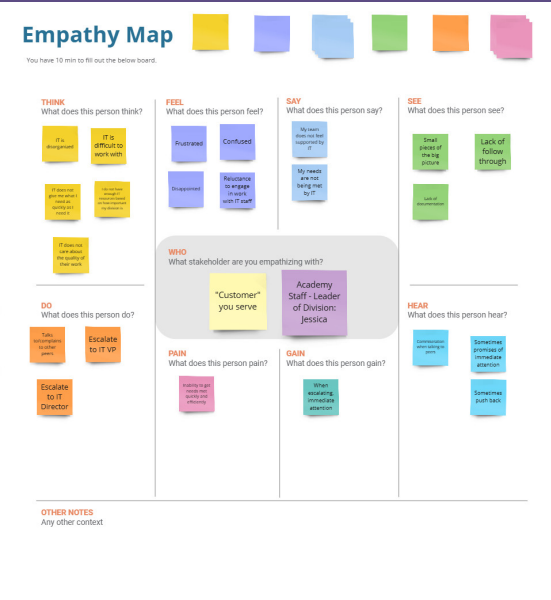
Service Model Canvas



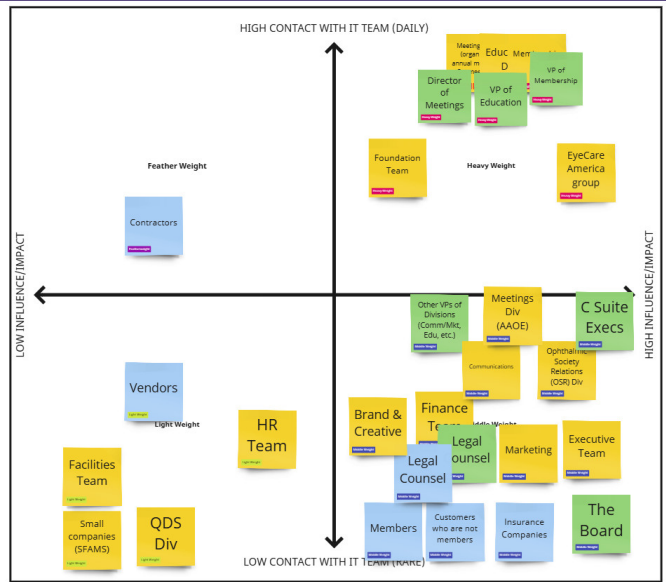
Landscape to Competency

It was key for the AAO team to develop not only internal empathy and understanding but also an understanding of external factors. As facilitators, CREATE used mapping tools—including Empathy Maps, 2x2s, and Stakeholder Maps—to gain shared insights into key stakeholders and their IT experiences. These visualizations clarified the team’s role within the broader Academy ecosystem, highlighting opportunities to align IT services with stakeholder needs. By identifying pain points and priorities, the team can now deliver more targeted, impactful solutions that enhance collaboration and efficiency across the organization.

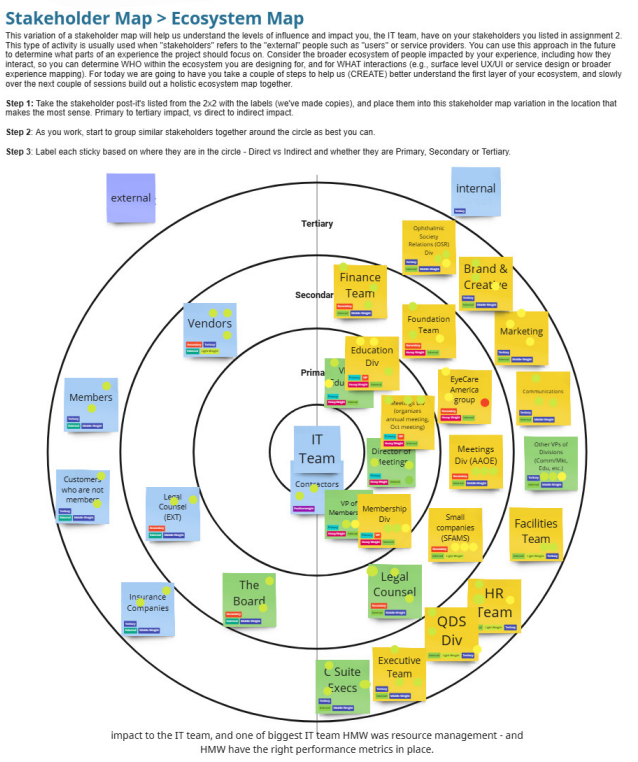
Empathy Mapping



2x2 & Stakeholder Map



Copies of Assignment 2 Stickies Below



Prioritized Opportunities

Understanding stakeholders's pain points was critical for the team to make progress. By using the How Might We (HMW) framework, we captured their biggest concerns, translating them into initial hypotheses about core challenges. These hypotheses served as a benchmark, enabling the team to compare them against research insights and final solutions later in the project.

Additionally, these discussions resulted in a clear Ecosystem Map, providing a shared visualization of the organizational landscape and daily operational context.

How Might We (HMW)

How Might We (HMW)

On this board we'd like to understand AAO IT team's perceptions of what the challenges are of the current service, experience and process you provide. Where issues, blocks, complaints you are facing. We'll spend 30 minutes following the prompts below and then 10 minutes prioritizing the How Might We's you come up with.

Where are the opportunities for your organization to overcome obstacles and challenges? (5 min)
Begin your post-it with "There's an opportunity to..."



State the ultimate impact you're trying to have. (5 min)

Each person can have a slightly different variation on their own post-it



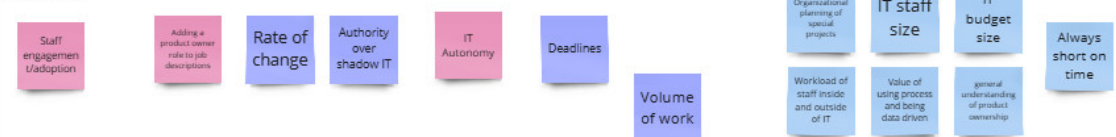
State any assumptions about the problem(s) and challenge(s) you're facing. (5 min)

One assumption per post-it



Write any context and constraints you're facing (e.g., geographic, technological, and/or time-based). (5 min)

One per post-it



How Might We (Action) (What) for (Stakeholders) in order to (Make What Impact) ?

Using the thoughts you've written above, frame your challenge(s) below in the Mad Libs How Might We (HMW) question format shown. (10 min)

One per post-it



Prioritize the above HMW statements using the dot voting. (10 min)
Put them in order left to right, each of you get a green yellow and red



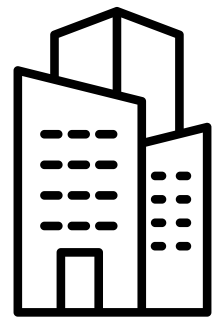
Mapping the Ecosystem

Ecosystem Mapping 101

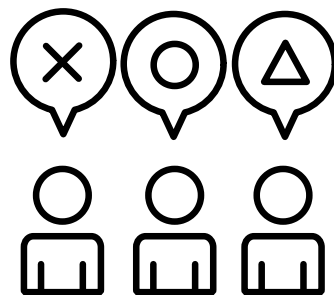
Ecosystem Maps are a powerful tool that can help your organization visualize the people, relationships and dynamics within a specific system, and then identify patterns, opportunity gaps and strategies to strengthen that system.

Elements that Make an Ecosystem Map

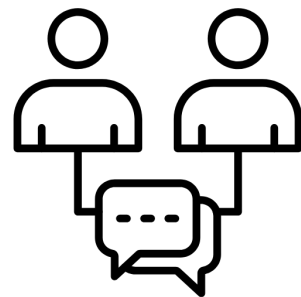
An Ecosystem map is made up of elements called "nodes," such as entities, organizations, stakeholders, resources, policies, and the interactions and relationships linking them together



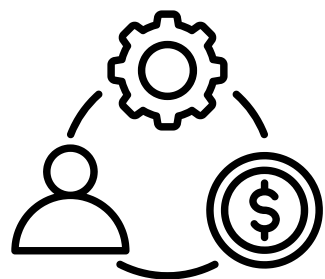
Organizations



Stakeholders



Relationships



Resources



Policies



Interactions

Tips and Tricks

Diversity

Make sure to involve a diverse set of perspectives (stakeholders, people, etc.) in the process, as this will lead to a more accurate map.

Visual Elements

Utilize a variety of visual elements to represent the ecosystem elements (nodes), such as shapes, colors, symbols, line thickness, etc.

Storytelling

Clearly indicate your flows, interactions, elements and patterns to make sure they tell the story you're wanting to understand, to maximize the potential of finding the right opportunities for you and your team.

Iterative Process

This map is a living, dynamic document. As things change within your organization, regularly check back with the visual to update with new data as needed.

Creating an Ecosystem Map

1. Define Purpose

Setting the objective of what you want to understand will determine which factors & people are important, or not, and the level of detail necessary.

2. People

Identify the stakeholders, users, and other players within this ecosystem and their roles - impact and influence. Consider a Stakeholder Map.

3. Systems & Services

Identify what other internal/external aspects are at play within the system (e.g., resources, policies, economic conditions, tech advancements etc.) and how they interplay with the existing ecosystem.

4. Relationships

Develop the most important relationships at play between the aspects within the system and connect them with visual representations to show their relation (e.g., different lines that are different colors and thicknesses).

5. Metrics

Collect the ecosystem and organizational metrics that are key to you and your stakeholders and visualize them on your map.

6. Analyze & Iterate

Together with your stakeholders and partners review the map, understand the opportunity gaps, and develop strategies and next actions. Regularly check back with the visual and restart this process to update with new data.

Benefits of an Ecosystem Map

Improved Collaboration

Mapping stakeholder relationships can increase collaboration in key areas.

Opportunity Gap Identification

Ecosystem visuals can highlight areas normally invisible in siloed visuals, enabling innovative and targeted strategies.

Resource Optimization

Mapping the flow of resources allows for optimizing allocation and usage of resources.

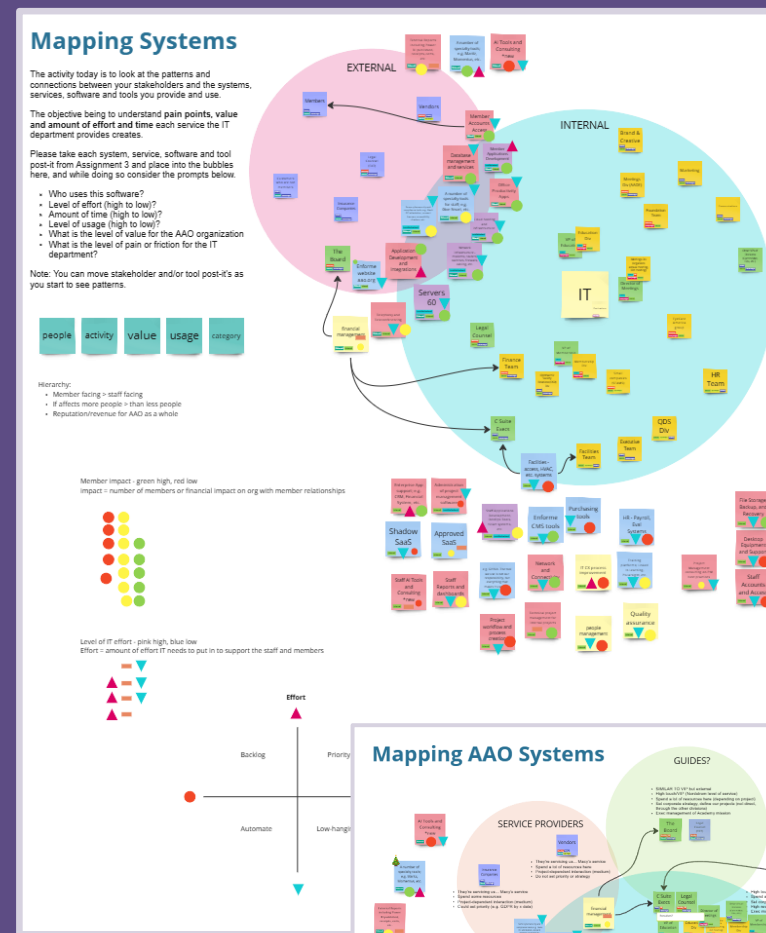
Ecosystem Map Working Sessions

During various working sessions with CREATE Strategy, the AAO IT team developed their Ecosystem map layer by layer. Starting with utilizing their previously built stakeholder maps, then building out relationships and how each member impacted IT's work, and adding in systems, software, services, and tools (SSTs) as well as metrics that comprised the final layer. This visualization gave AAO key insights on how to better work with their stakeholders in the future from an "inside-out" viewpoint.

First Pass Visual

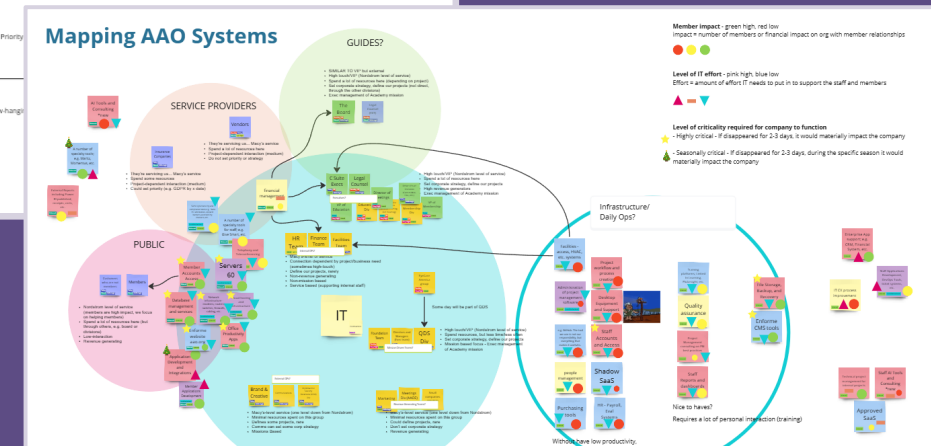
1

Internal/External Stakeholders



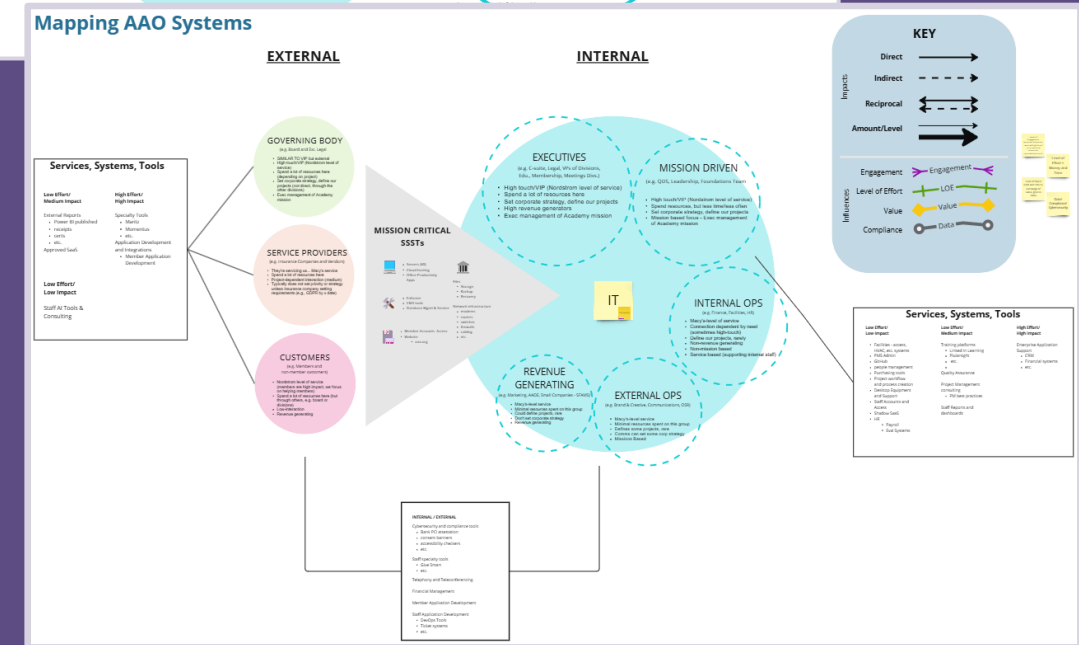
2

Member Relations / Impact / Level of Effort



3

SSSTs/ Metrics

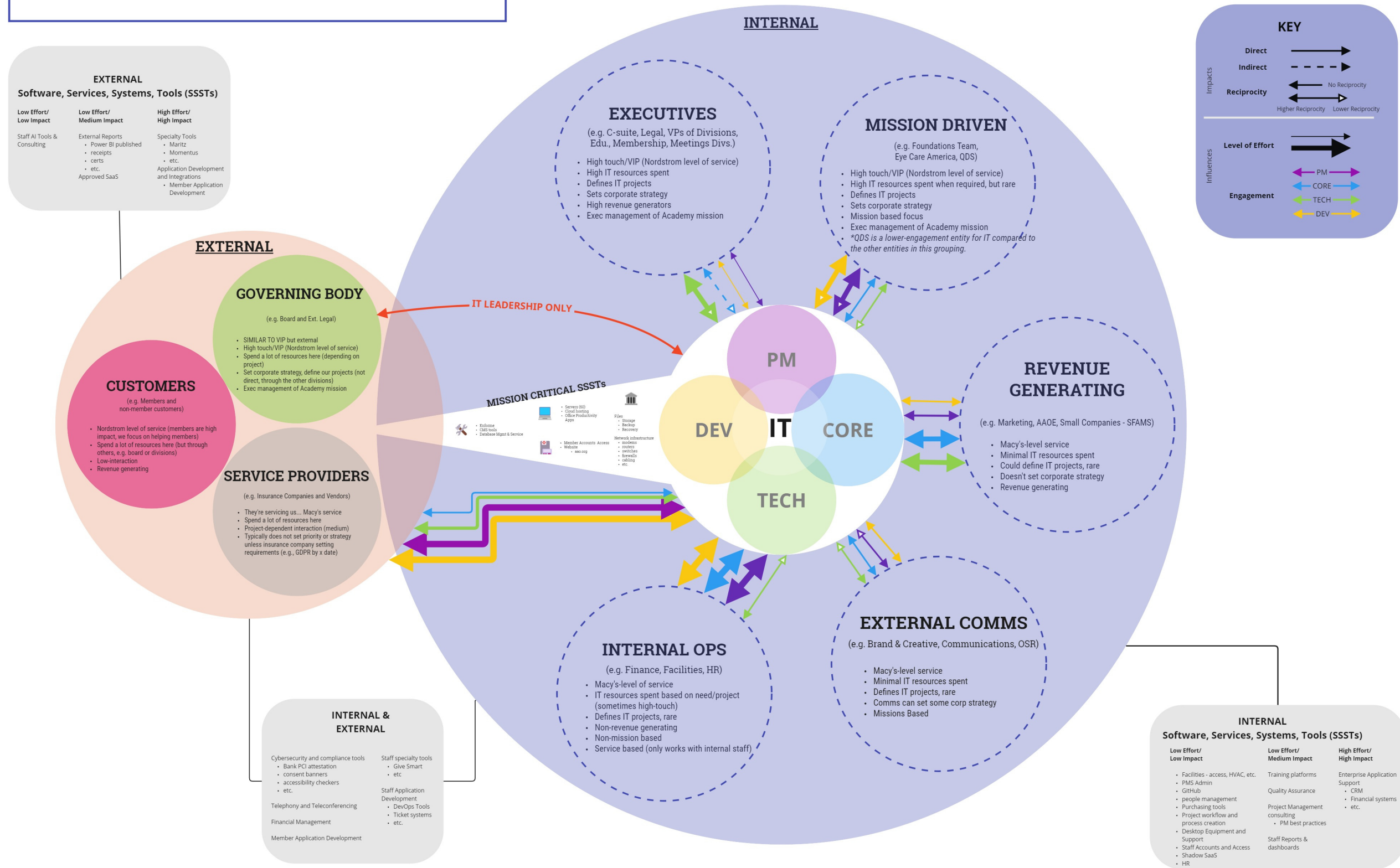




AAO IT ECOSYSTEM MAP

Ecosystem maps are a powerful visual tool that signifies relationships and dynamics between key stakeholders, their roles, their interactions, and how value flows within the system. Its use can help in identifying gaps, opportunities, and strategies for strengthening the ecosystem.

Having an Ecosystem Map is important for AAO's IT team to help visualize and understand their stakeholder relationships, and the effort and engagement involved with these relationships. This visual helps depict these different internal and external relationships, the differing level of engagements and what tools they're using to support them.



Understanding the AAO Ecosystem Map - Goals

Show Current State

- A current state description of where and with who IT spends time
- A roadmap showing the goals both team and organization are moving towards
- Shows importance of the business units and their role within the ecosystem

Educate Others

- A visual way to share current state with key stakeholders
- Helping stakeholders understand service provided by IT
- Showing stakeholders how IT is engaged with them
- Helping stakeholders understand communication gaps and silos
- Highlights that member interactions are all proxied to IT

When to Use Ecosystem Mapping

The following are some signals that this is the right tool to use in a situation:

- Unclear about the people, components, tools, or systems that are involved in the problem
- Difficulty defining upstream and downstream inputs, outputs, and impacts
- Unknown relationships or level of effort between two entities
- Lack of clarity on how two elements relate or interact relative to one another
- Identifying gaps, overlaps, opportunities, and interactions

"Do we know who all the people, processes, systems and resources that impact our work?"

"How are our resources being utilized?"

"Do we understand what impact our decisions and changes we make will have on the people, processes, systems, and resources around us?"

"Are we collaborating with the right folks who are impacted by our work?"

"Do we have the right decision makers and/or champions involved in our work?"



Phase 1 Learnings

Ecosystem Map Key Insights

Value

- The more IT's work is visible, the more IT is perceived to have a higher value.

Support

- IT provides a tremendous amount of support and service to AAO and members, mostly through a proxy environment of other AAO divisions.

Reciprocity & Alignment

- Level of reciprocal engagement directly impacts positive relationship sentiment, and quality of product/service being delivered.
- While IT management is in agreement on HOW things get done, more clarity could be developed around the WHY.

Relationships

- IT needs engagement and participation agreements with their stakeholders to support clearer processes for work and parameters around outcomes and collaboration.
- By recognizing opportunity gaps, AAO's IT team can be more transparent with their work and better align to strategic goals.

Tracking Metrics

- Tracking metrics (including IT's own workload and satisfaction), will allow for data-driven choices that align with larger organization-wide strategies.

Phase 1 Summary

The Phase 1 deliverables—including the ecosystem map—surfaced two critical insights for the IT team:

- 1. They needed stronger internal alignment on connecting their work to business priorities.
- 2. Their key value differentiator emerged clearly: ensuring AAO’s access to up-to-date technology.

While identifying these opportunities, the team also recognized a challenge: the need to develop systems for tracking and leveraging success metrics.

Armed with these connections, the team was prepared to engage stakeholders in Phase 2—using external insights to drive opportunity identification and process optimization.

I Learned, I Wish, I Will...

Using the below, we'd like to understand what the AAO team learned from this Phase 1 with CREATE, what they wished they would have gotten out of Phase 1 but did not receive, and what they will do with this information moving forward.

I Learned...

What you learned from Phase 1

To make headway on process you need a significant number of dedicated hours to think about it.

IT does a lot! (Visual confirmation)

IT does not regularly take the time to inspect/adapt/change

learned more about ecosystem mapping process

I was reminded that there are large parts of the org that the larger group of T has very little interaction with

We need to do more marketing and forward presenting work

We did a lot here!

I Wish...

What you wish you learned but didn't from Phase 1

Would have been helpful to go through the 101 before doing the Ecosystem mapping sessions to understand why and how to use it.

Maybe check ins on where exercises fit within larger picture? ("doing this is going to help us do xyz later")

I Will...

What you will do in the future

Validate communication and understanding in different ways

I'm not sure this is possible without external viewpoints which reminds me to ask those people more questions.

Ask more questions!

Be more mindful of IT's place in the ecosystem of the org

Make more time to work with my direct reports

Try to always implement metrics and performance indicators to evaluate process

Joe

Brian

Alicia

Phase 2

Dec '24 - Jan '25

Objective:

Gather insights and empathy around stakeholder pain points with the current IT process.

Research 101

Research is an effective approach to building empathy and understanding of the world around you while also deeply informing all critical decisions with clear and proven data.

What is Research?

The goal of research is to utilize the various datasets available to you to empathize and understand the world around you and utilize that information to inform critical decisions about product, service and/or organization.

Things Research can do

- Makes sense of the 'real' problem is and why it exists.
- Helps teams develop deeper levels of empathy.
- Inquires and infers rather than asks.
- Complements other research activities.
- Inspires design of solutions that address people's needs.
- Co-creates and tests with users.

2 Types of Research

Quantitative

Numerical data.

It helps answer the "what, what extent, how many."

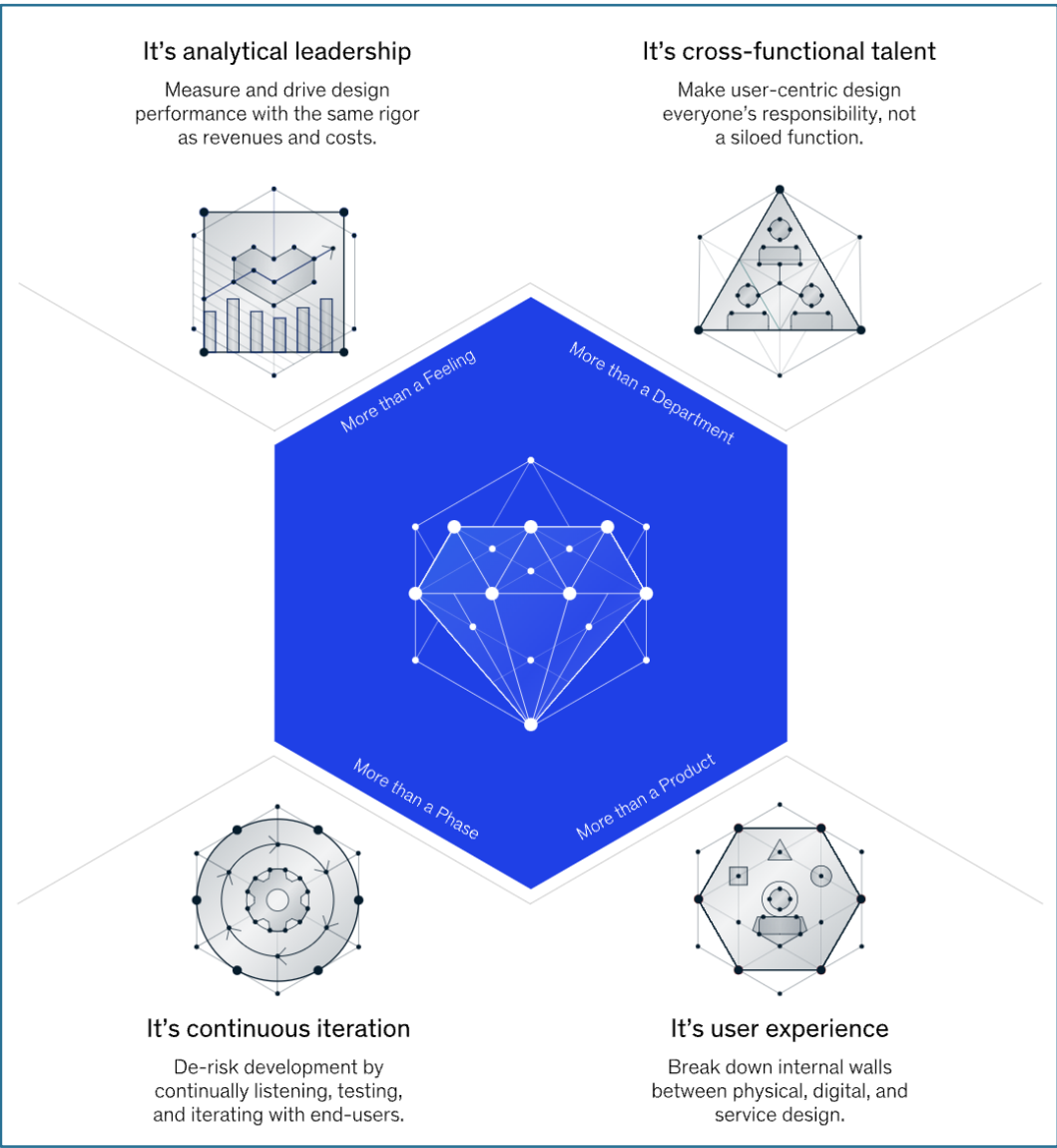
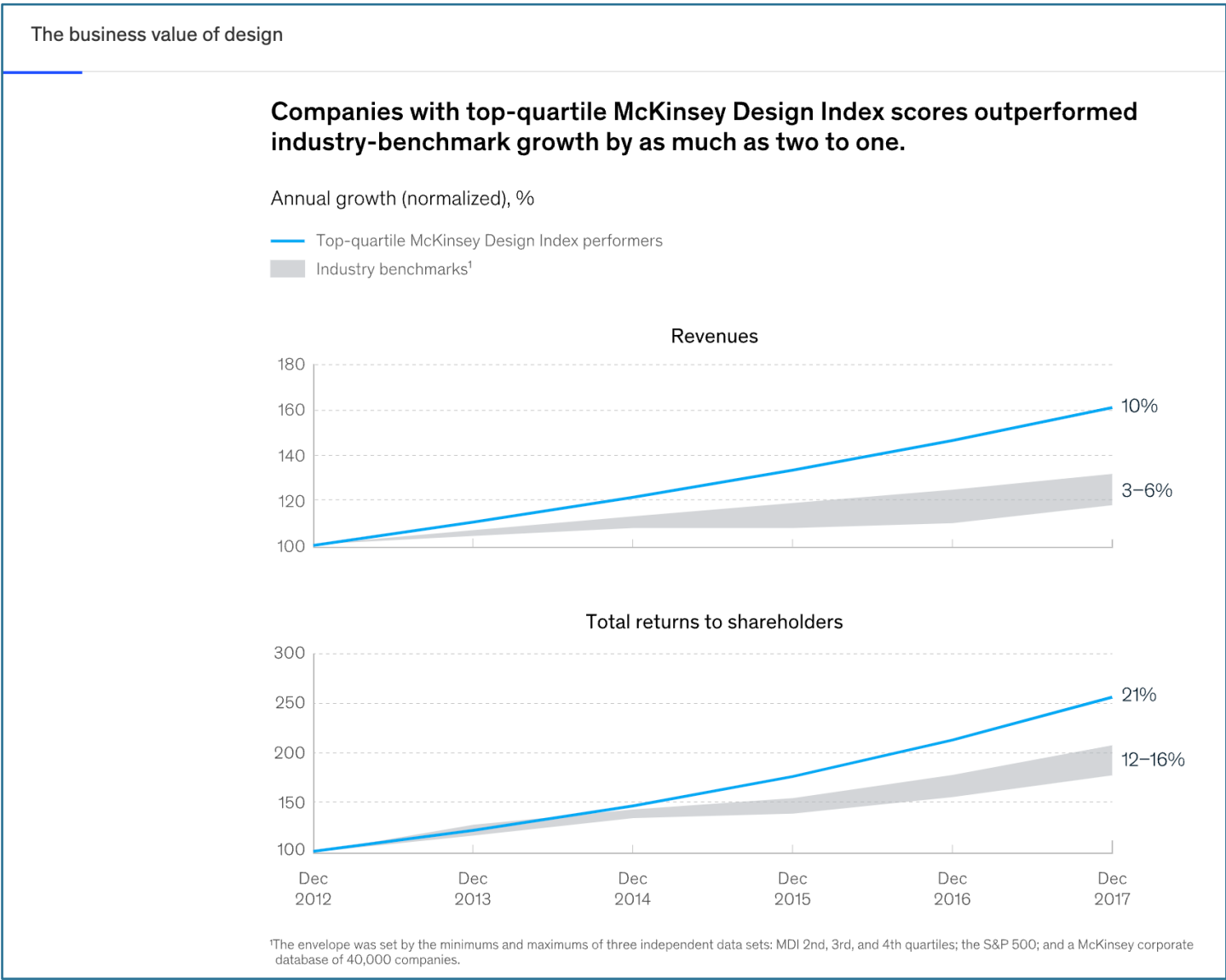
Qualitative

Behaviors, needs, and feelings.

It helps answer the context, the "why and how."

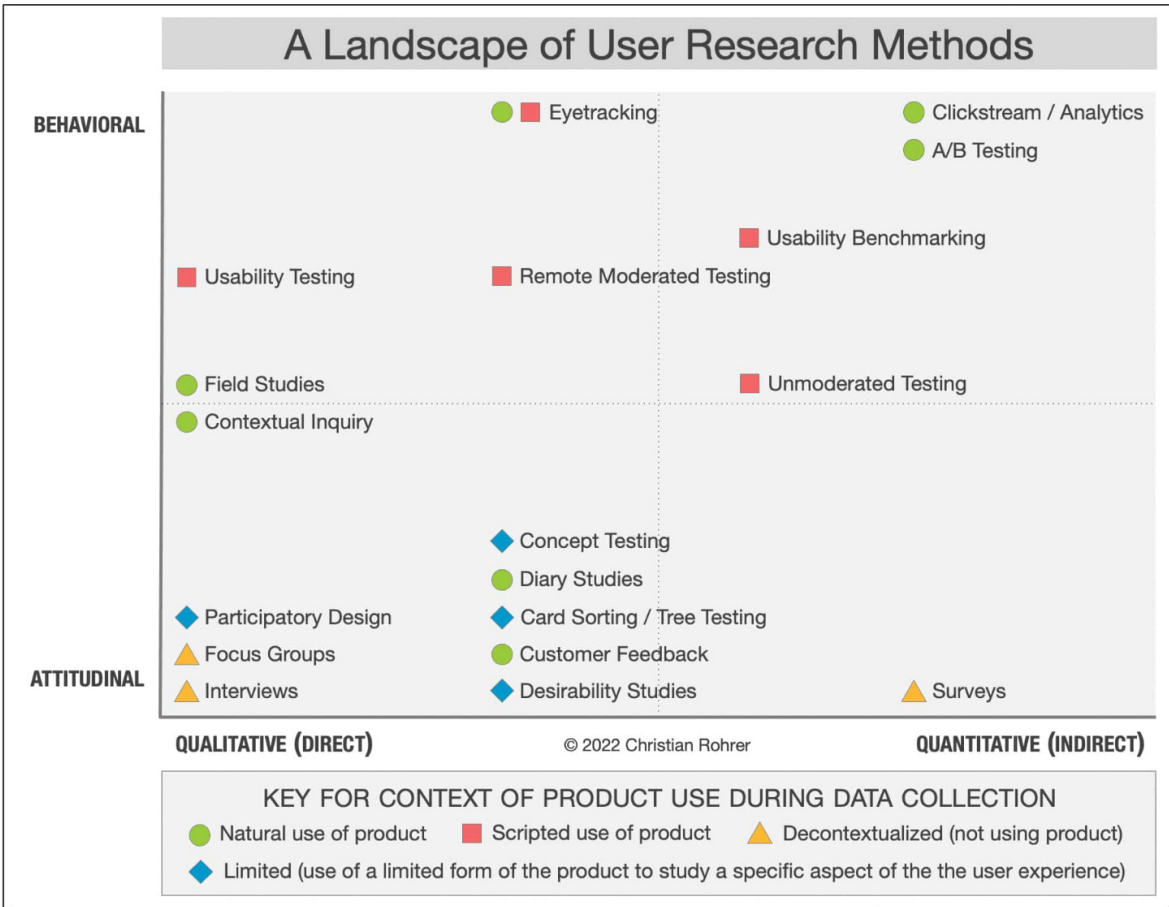
Value of Design and Research

What your team is working towards will have a value on the American Academy of Ophthalmology. According to [Mckinsey](#), companies that focused and worked at keeping design and research central to their business outperformed by 2x those who didn't. And These are the four themes of "good-design" with which they measured that success.



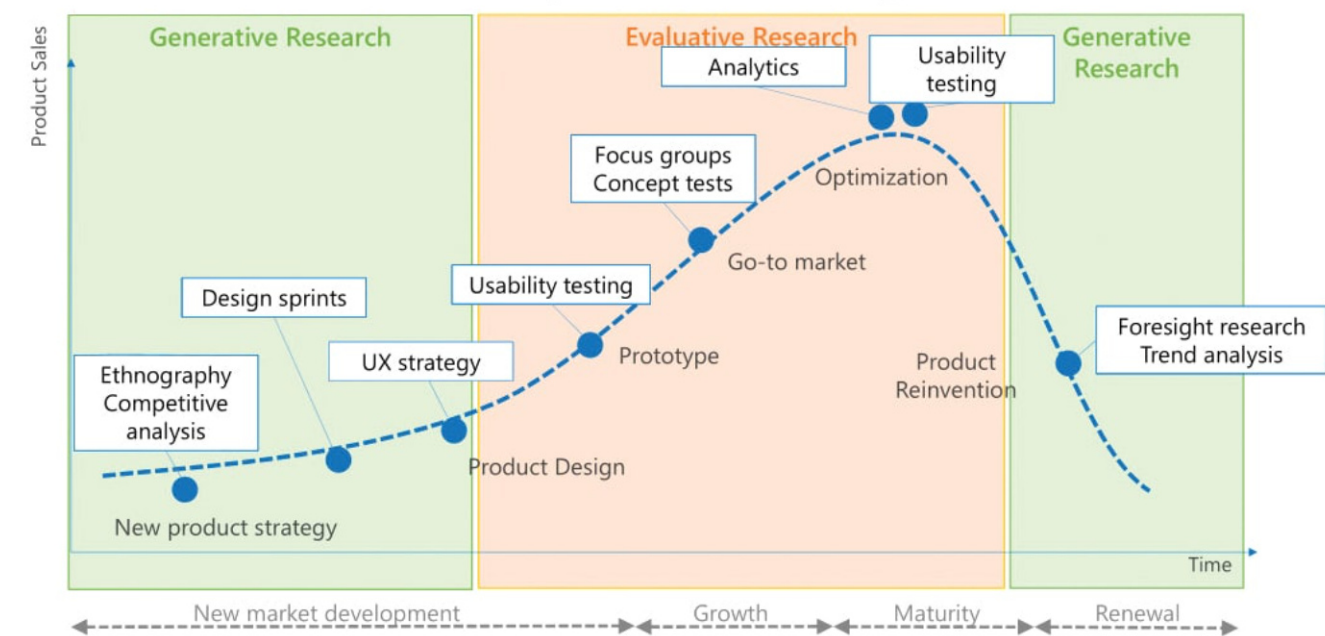
Research Methodologies

There are vast number of research methodologies, both quantitative and qualitative, and they can be used for a variety of differing goals. You can also mix these methods to improve your success of collecting the right information.



Christian Rohrer's "Landscape" organizes user research methods by behavior/attitude and quantitative/qualitative.

Research across the product lifecycle



Sam Ladner organizes user research methods by the maturity stage of the product's sales.

When To Use Research

The following are some signals that this is the right tool to use in a situation:

- Unknowns or gaps causing delays or obstacles with starting or progress
- Unsure what problem or opportunity you are solving for (unclear goals/outcomes)
- Difficulty identifying your audience and/or their needs
- Making more assumptions than using hard facts or data to fill unknowns
- Encounter conflicting opinions on any of the above
- Build a case utilizing data to support a claim, idea, etc.

PRO TIP



If you'd use a magic eight ball to decide what to do next, it's time to do some research.

"Will understanding others' needs and opinions change the outcome or direction of what we're trying to accomplish?"

"Will developing a broader understanding bring guidance and/or empathy?"

"Will research allow us to gain knowledge that allows us to move forward?"

"Does the information we plan on collecting have a clear goal and stakeholder/team buy-in?"

"What type of information and/or data do we need to answer our questions?"



AAO Stakeholder Research

Purpose & Method

The AAO IT team conducted **stakeholder interviews** to gather feedback from key stakeholders regarding their perceptions and needs on the current IT process and IT team interactions.

These insights revealed opportunity gaps and potential solutions to enhance the team's resource management, collaboration, and overall effectiveness within the Academy.

For more information you can review the below materials:

Research Plan, Screener and Guide - [AAO Research Plan - Phase 2.docx](#).

Recommended facilitation guidelines - [Facilitating Best Practices Handout.pdf](#)



Participants

16 AAO Internal Stakeholders



Session Dates:

January 6-17



Research Location

Remote



Session Length:

60 minutes

Stakeholder Interviews

AAO interviewed 16 of their stakeholders over a 2 week period to gain a deeper understanding into the various qualitative needs, wants and behaviors.

Throughout the interview process, the team applied non-biasing facilitation techniques and note-taking techniques they learned while working with CREATE Strategy, all to support analysis and developing optimized key insights.

Pain points/
Improvements

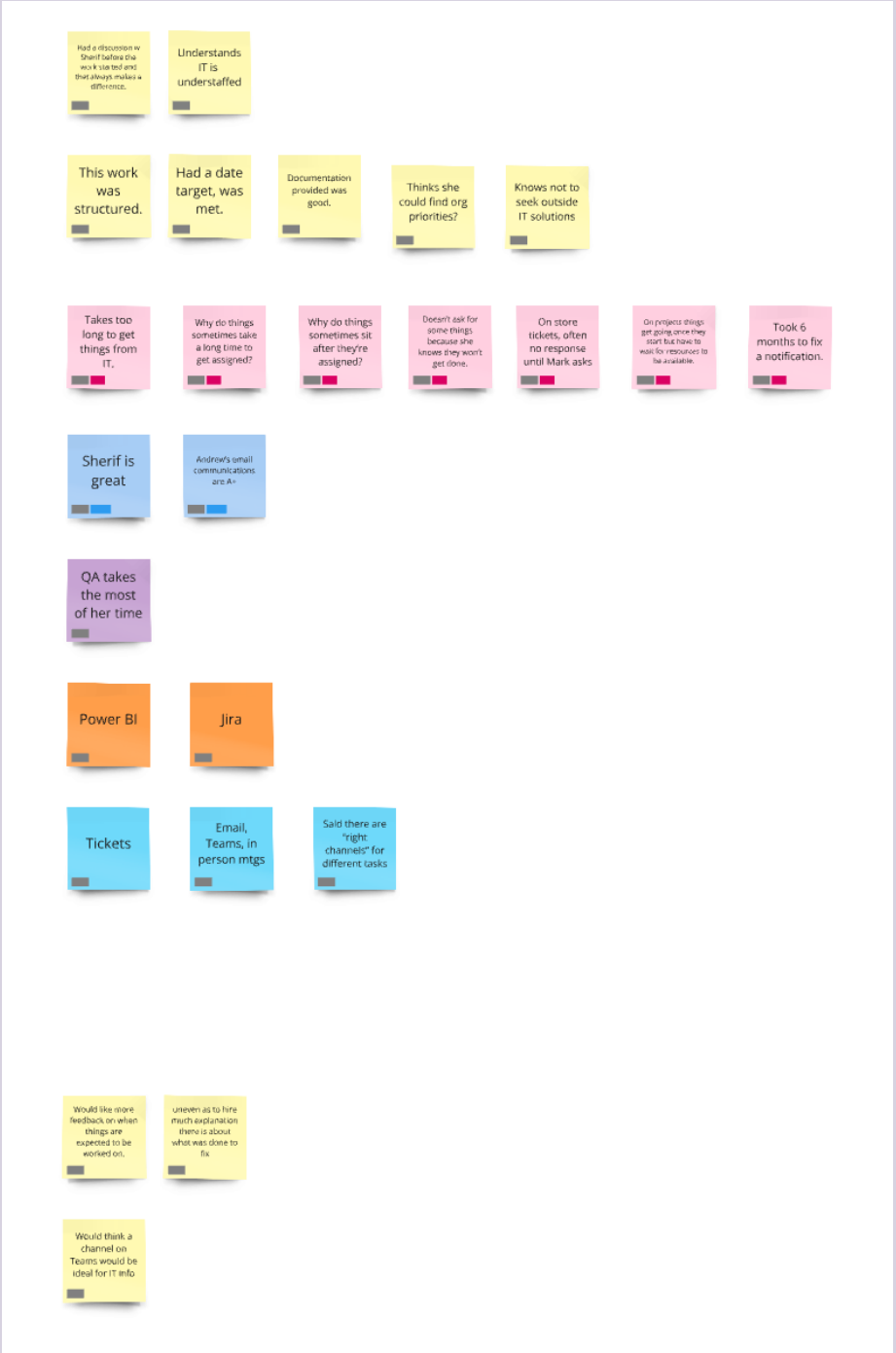
Delights

Most time spent

Tools/Services/
Systems

Communication
Channels

Unkowns/
Questions for
Follow-up



Synthesis + Insights

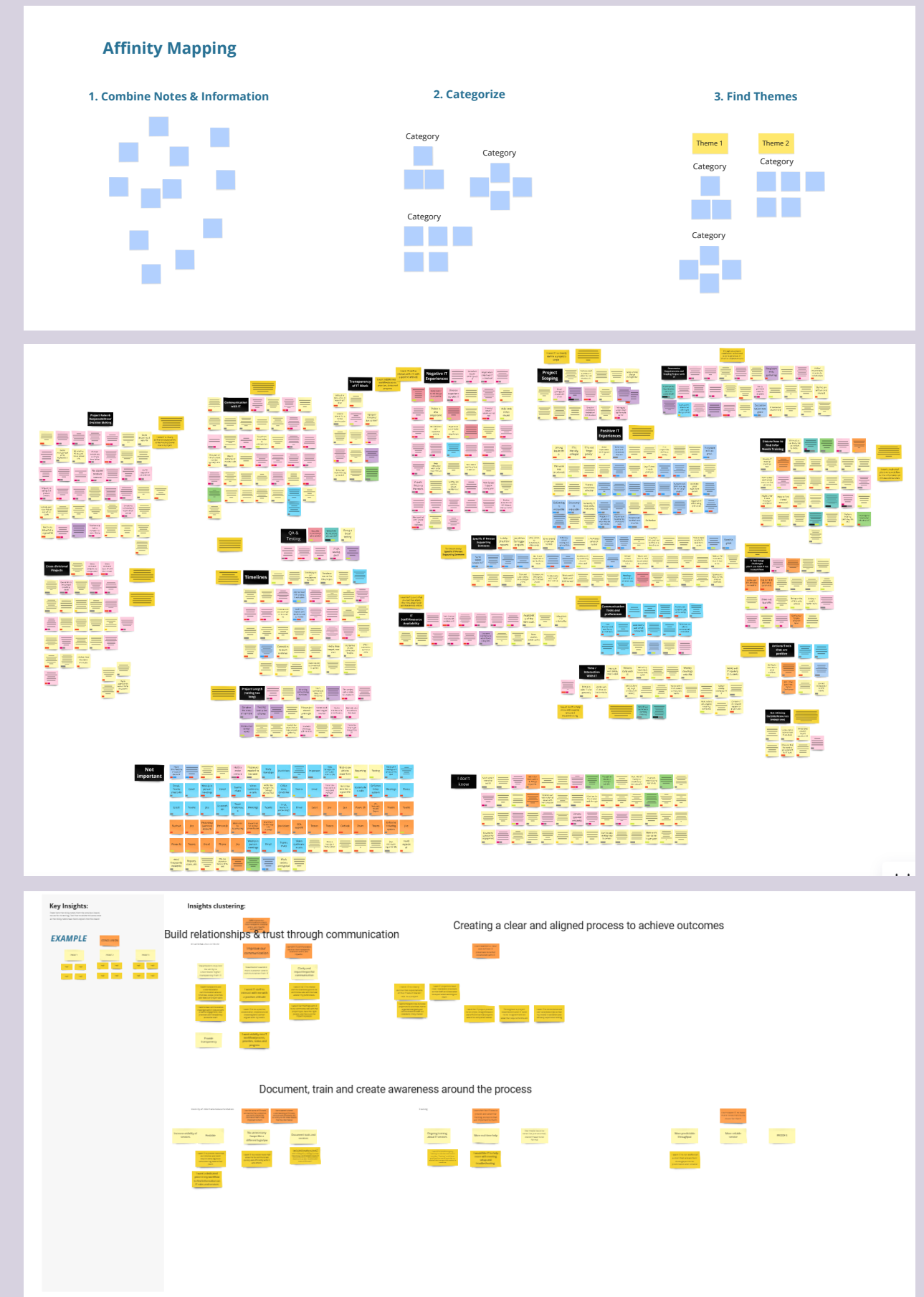
After conducting the interviews, the IT team organized their raw research data and findings, including interview notes and observations, into thematic categories. They used a method called **affinity mapping** (or affinity diagramming) - a three-step process illustrated in the image on the right.

This process:

- Surfaced patterns that contradicted internal assumptions
- Uncovered deeper stakeholder motivations
- Enabled prioritization using How Might We (HMW) frameworks to distill critical "outside-in" insights

The resulting key insights (seen on the next page) transformed raw data into actionable priorities becoming the foundation for key decision-making in the following phases:

- Informing workshop agendas
- Ensuring solutions targeted core pain points
- Aligning IT's future-state vision with organizational strategy



Stakeholder Interview Key Insights (Phase 2)

During initial findings the IT team determined that the stakeholders desire better communication and alignment around projects. The stakeholders specifically asked for customer-centric processes with detailed and transparent documentation, information, and training to support effective outcomes. The IT team seeks to utilize this knowledge to build better relationships, trust, collaboration, and effectiveness with their external stakeholders.

Customer-Centric & Transparent Communication	Process Creation & Alignment	Information Awareness
<p>Stakeholders each had their own expectations and workflows, and hoped for more transparent communication that align to their needs.</p> <ul style="list-style-type: none">• <i>I want transparent and understandable communication around timelines, scope, priorities and status of project work</i>• <i>I would like meetings with IT to be commensurate with the project type, have the right people, and focus on the impact to people.</i>• <i>I want visibility into IT workflow/process, priorities, status, and progress</i>	<p>Stakeholders wanted a clear and defined IT process, that clarifies roles and responsibilities, project goals, status, and more to improve alignment with IT.</p> <ul style="list-style-type: none">• <i>I want IT projects to have clear, repeatable processes so that staff can know what to expect when working on them</i>• <i>I want the IT project process to be simple, straightforward and efficient so that projects would be completed sooner</i>• <i>Throughout a project stakeholders and IT need to be in agreement on what the requirements are</i>	<p>Stakeholders wanted easier ways to find and interact with IT documents, tools, and trainings that are important to them in ways that match their current workflows.</p> <ul style="list-style-type: none">• <i>I want a dedicated place in my workflow to find information on IT roles and services</i>• <i>I want IT to provide ongoing "training" on services and tools it provides.</i>• <i>I want IT to provide tools that are intuitive and don't require extra logins or remembering how to find them</i>

Phase 2 Summary

During this phase, the team established a clear research objective, developed a structured plan, and created a comprehensive interview guide. They also refined key facilitation skills allowing them to conduct effective stakeholder interviews, ensuring the collection of valuable insights.

These findings will serve as the foundation for designing an optimized future-state process, enabling the identification of targeted solutions to address critical challenges.



Phase 3

Jan '25 - Mar '25

Objective:

Build a graphic visualization of the IT process (e.g., process blueprint) to allow for stakeholders to co-design and identify opportunities and metrics for improvement

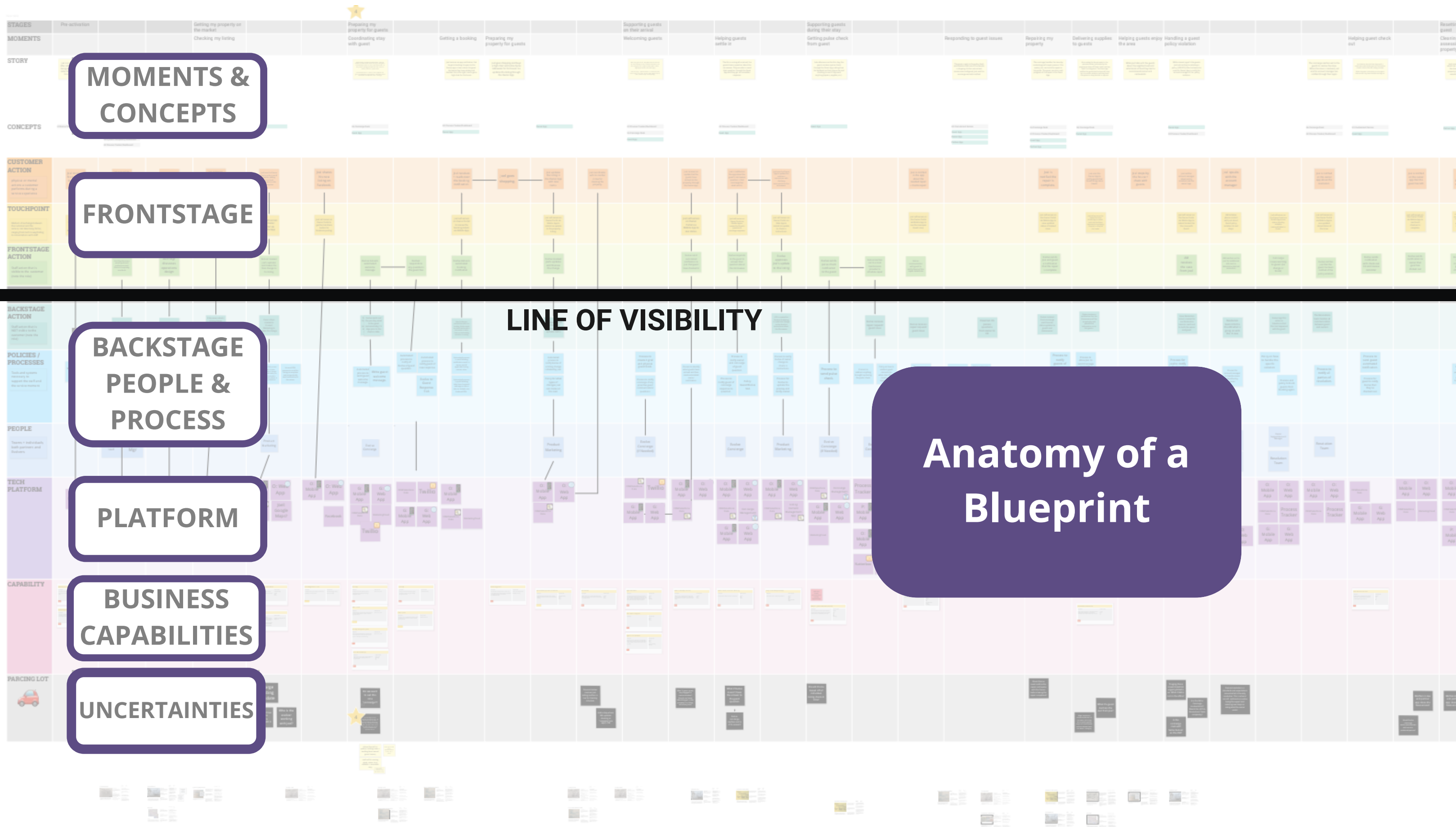
Service Blueprinting 101

A service blueprint visualizes a key service or experience and how channels, touchpoints, people, processes, and technologies deliver that to provide organizations a valuable alignment tool.

What is a Service Blueprint?

- A service blueprint documents key customer pathways and shows how channels, touchpoints, people, processes, and technologies deliver that experience.
- There are two kinds of service blueprints: **current state** and **future state**. Blueprints connect the dots across front stage and backstage, creating experiential and operational fit.
- **History:** Service blueprints aren't new tools. They were originally proposed by Lynn Shostack in her 1984 Harvard Business Review article "Designing Services That Deliver" and have been evolving since. Feel free to dive deeper using Adaptive Path's "A Guide to Service Blueprinting."
https://www.dga.or.th/wp-content/uploads/2019/09/file_26e487aea69af163911dc4f6e6b8abd4.pdf



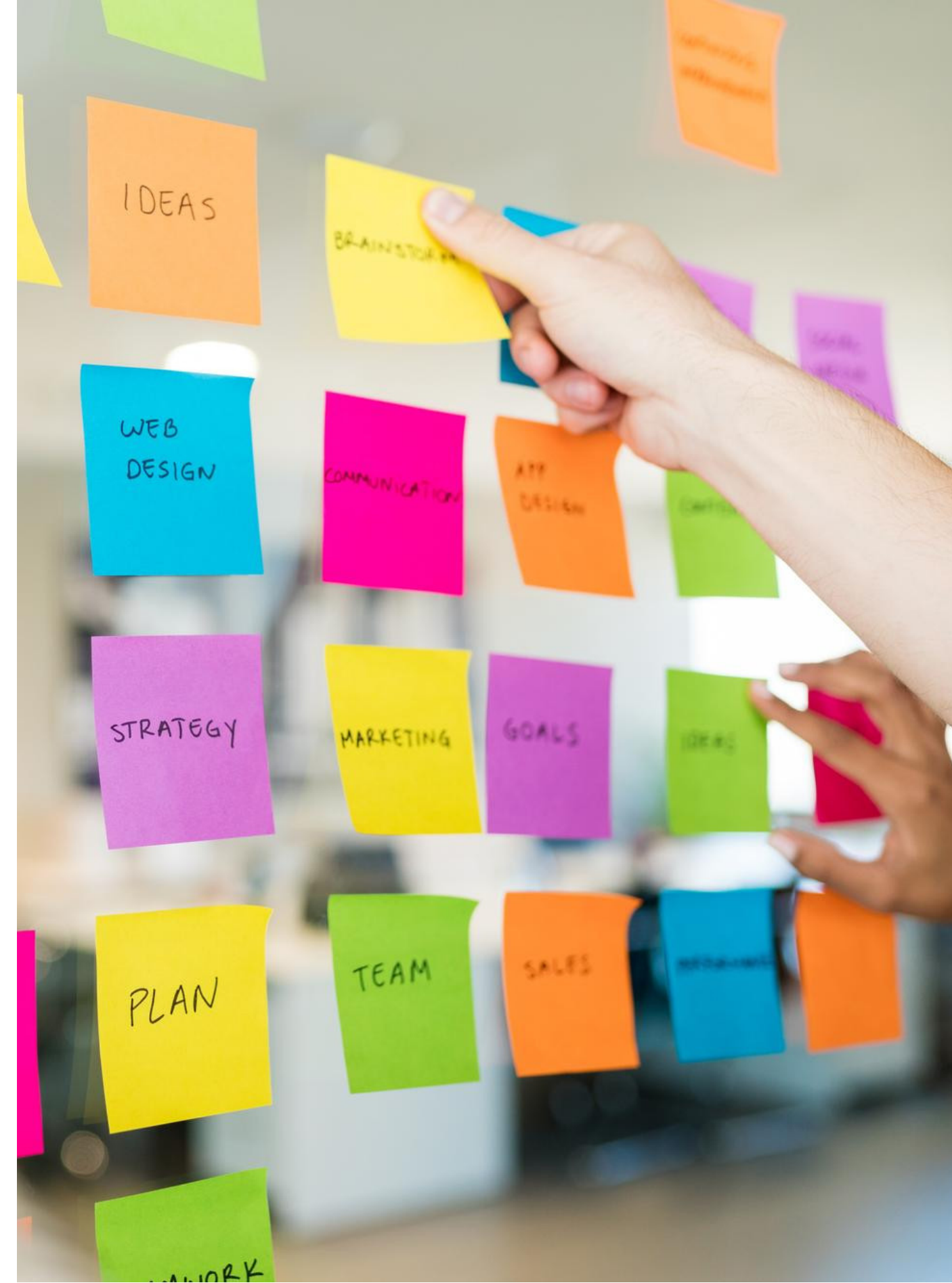


Current State Service Blueprint

- Documents how the current customer journey is currently implemented across channels, touchpoints, and time.
- Visualizes how people, processes, platforms, policies, and products deliver and support the end-to-end experience.
- Provides a baseline to spark inquiry, understanding, opportunity identification, and new approaches.

Future State Service Blueprint

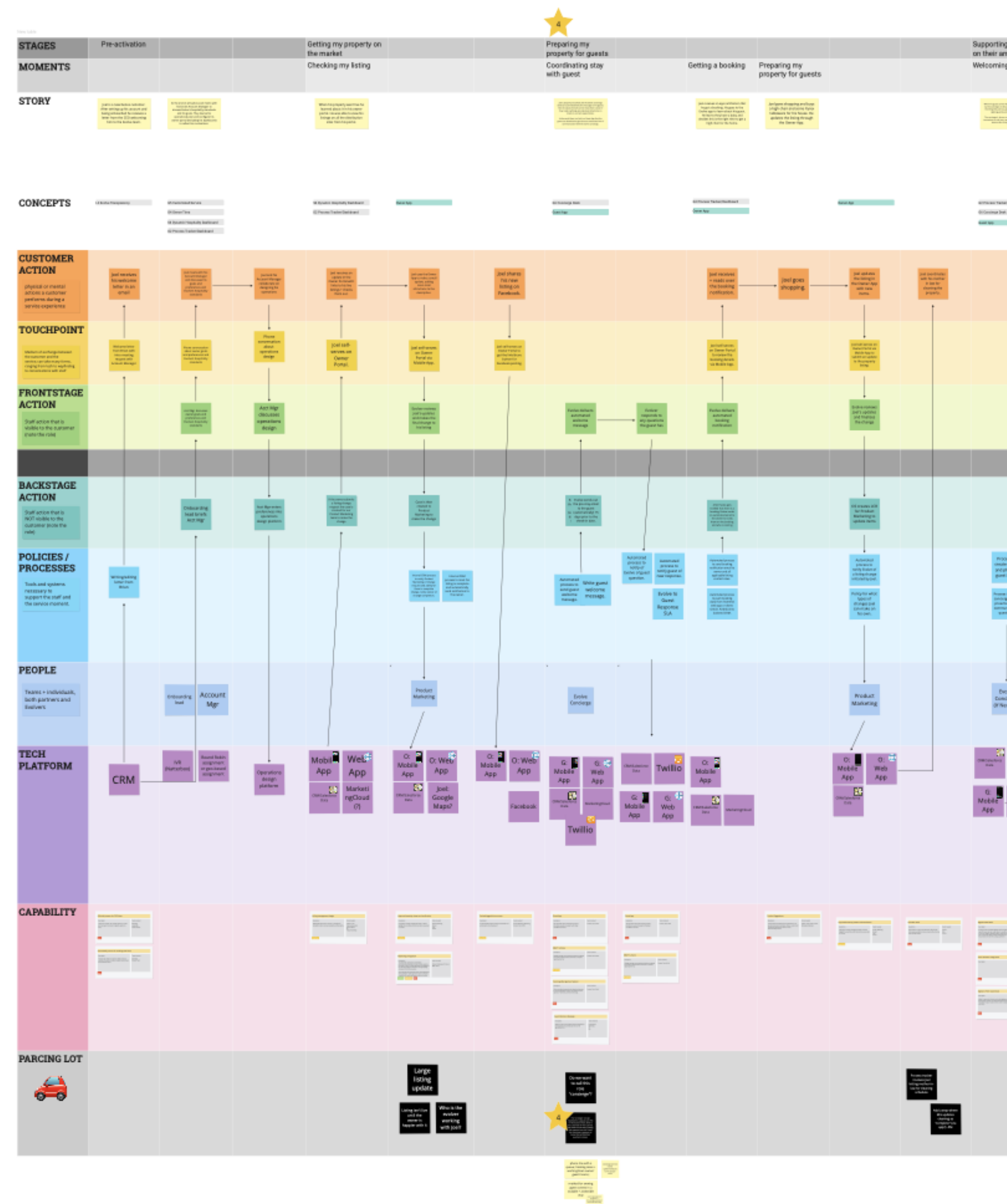
- Visualizes how to deliver a future state end-to-end experience.
- Helps prototype options and/or formalizes agreements to what will be designed and delivered across teams.



Value of Service Blueprints

- **Holistic** – Brings together front stage of customer flow and interactions with backstage of operational efficiency and integration.
- **Hive Mind** – Gets people in the same room who typically work in organizational silos. Their combined expertise is needed to begin to understand the full service system.
- **Shared Tool** – Creates a cross-team model to analyze, prototype, and evolve the service experience.

CREATE Strategy CONFIDENTIAL



When to Use Blueprints

The following are some signals that this is the right tool to use in a situation:

- Unsure what or where a known problem exists
- Unhappy customers, employees and/or stakeholders
- Producing and maintaining product/service costs more than is profitable
- Siloed departments that have trouble collaborating causing
- Poor alignment on what a process is, and input points
- Inefficiencies between people (employees, customers, providers, etc.), processes, systems, and tools

"There is clearly an issue, but what is it or where in our processes does it exist?"

"Do we know when in our process we need to be collaborating with others, and who?"

"We use a lot of work arounds to get our jobs done. Is there a better way to work?"

"Why are customers continuing to complain about the same thing(s)?"

"Why are tasks/actions not getting done in the required timeline? Who is responsible?"



AAO IT's Service Blueprint

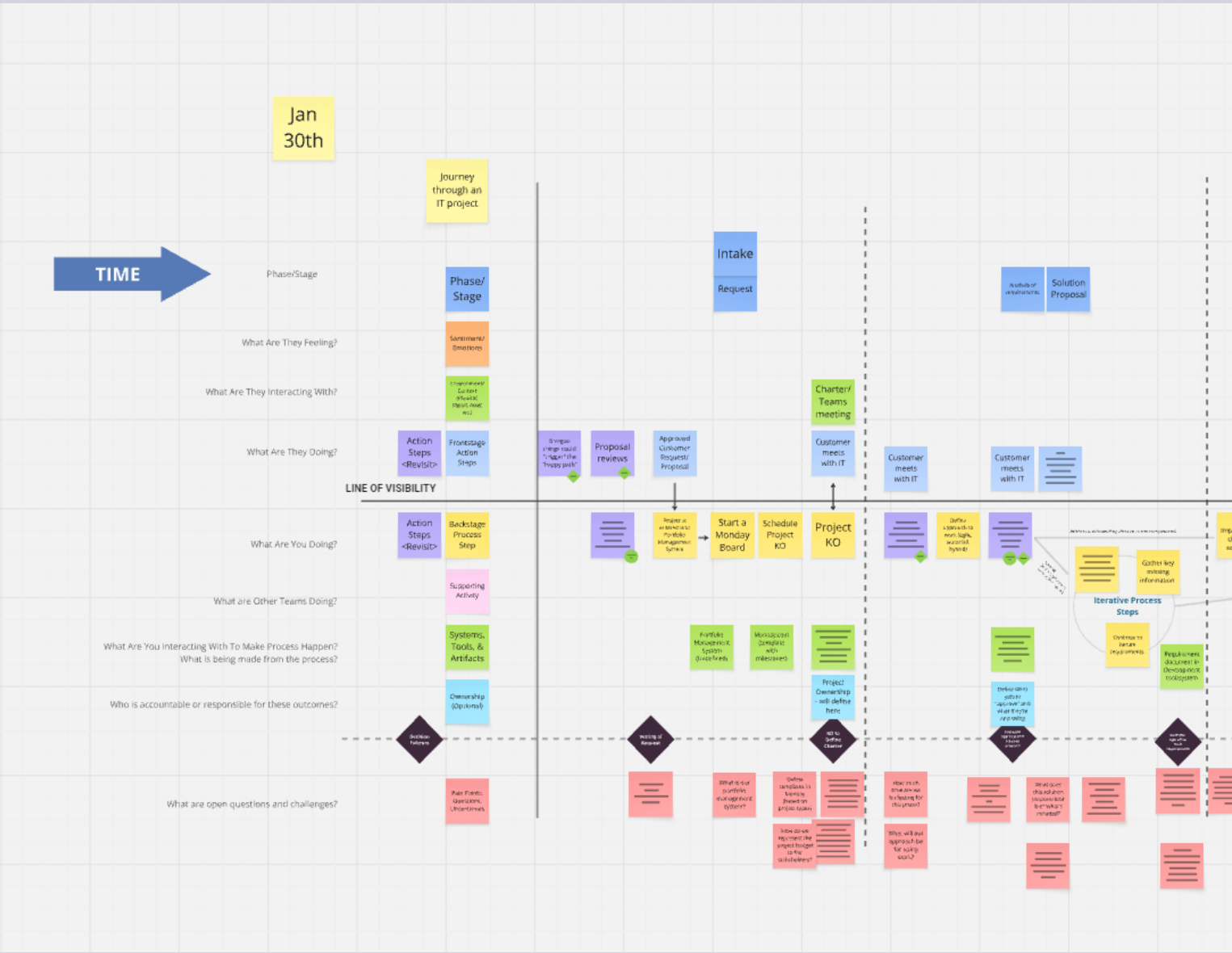
Ideal-State Blueprint

Working Sessions

Guided by CREATE Strategy, the AAO IT team leveraged their aspirations, ideas, and stakeholder insights to define an ideal future-state through a series of working sessions.

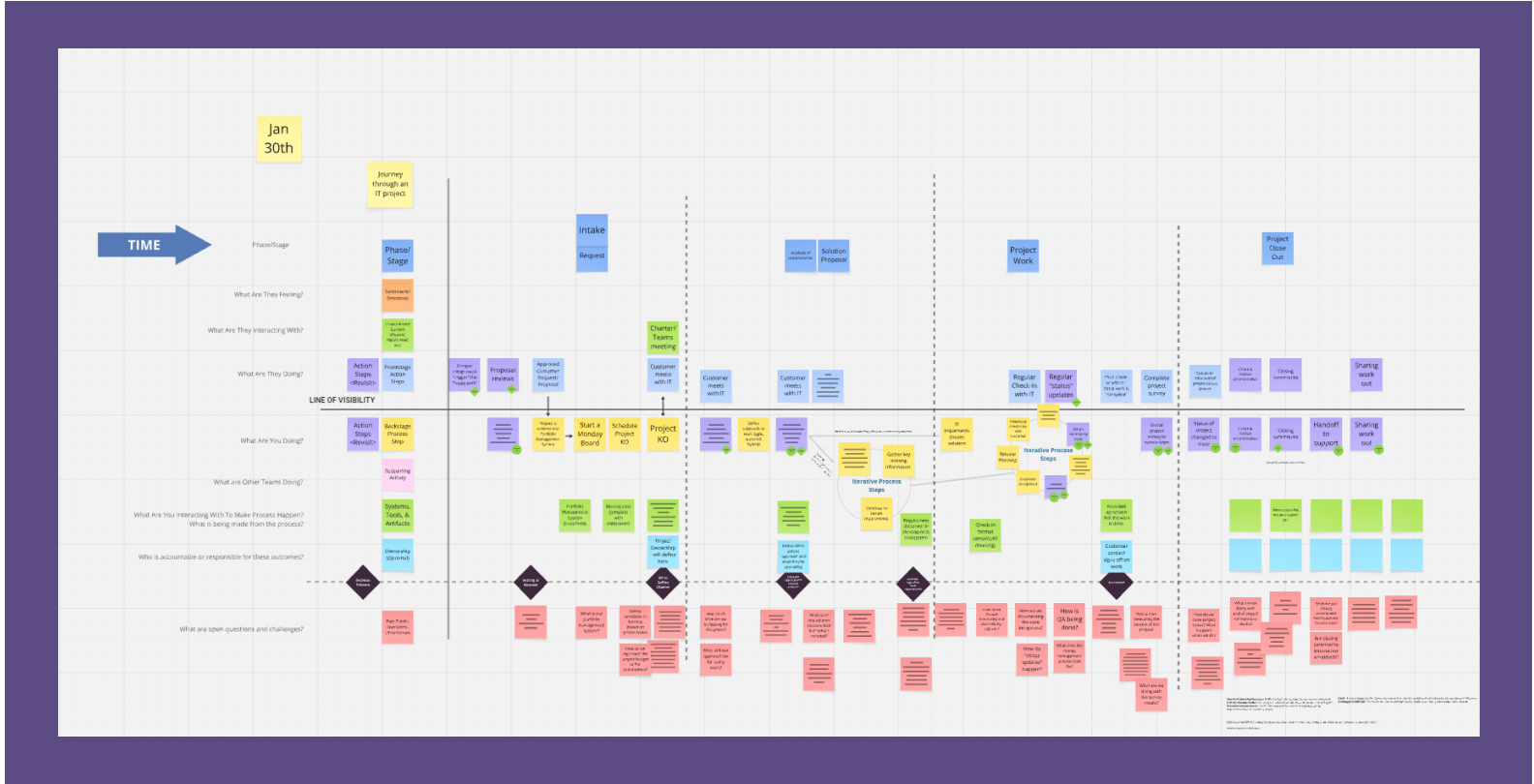
The process began by mapping the "front-stage" stakeholder actions and "back-stage" team activities, then identifying the associated software, systems, services, tools (SSSTs), and documents in use. Decision fulcrum points were subsequently documented, which also helped define the process phases across the top.

Throughout the process, emerging questions and pain points were captured and highlighted on red sticky notes for further review.



HMW

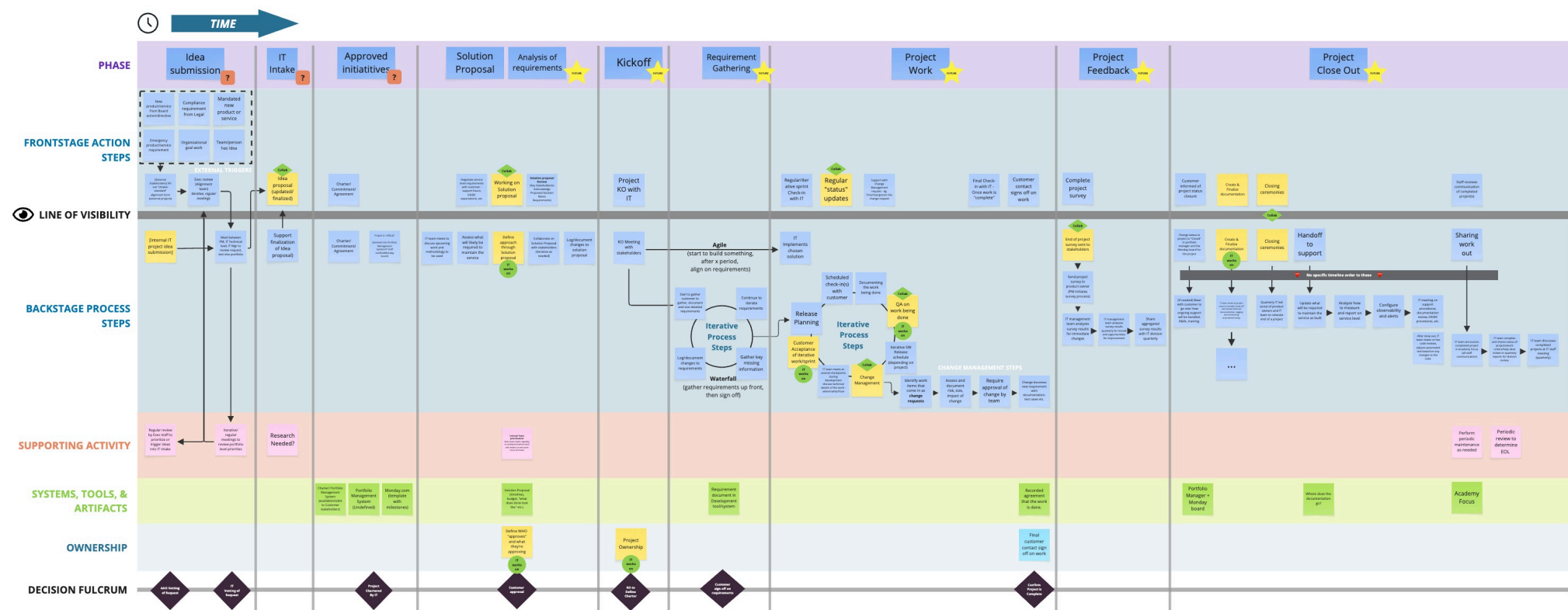
This ideal process clearly demarcated the unknowns and impactful opportunity areas, allowing the AAO IT team to develop 20 clear HMWs. Giving them a great starting point for collaborative and generative discussions in their upcoming two-day co-design workshops with their IT team stakeholders and organization-wide stakeholders.



- 1 HMW improve setting expectations around stakeholder engagement and responsibilities during projects to ensure alignment
- 2 HMW define and communicate our processes so that our stakeholders can easily understand them - ROUGH
- 3 HMW bring IT into other department's work earlier in order to deliver a better product efficiently
- 4 HMW improve our communication to ensure more transparent, customer centric and impactful communication
- 5 HMW improve the quality of IT documentation, internal to the team (e.g., project artifacts, test plans, SOPs, tickets, change logs, end user documentation, etc.), so that there is a clear picture of what work was done - no matter who is reviewing the documentation
- 6 HMW communicate and receive commitment from our stakeholders in order to ensure the resource requirements and responsibilities are understood
- 7 HMW improve our process for stakeholders so that we are aligned on intent/deliverables at the beginning of an engagement
- 8 HMW have a flexible approach to project methodologies so that we choose the right fit for each project
- 9 HMW define and use hybrid project management for our stakeholders in order to be more efficient and transparent
- 10 HMW work with our stakeholders to achieve alignment and agreement with project due dates
- 11 HMW communicate status to our stakeholders so that we deliver pertinent information in a clear and consistent way
- 12 HMW improve the quality of our work so that we deliver better products and respect our stakeholders' time
- 13 HMW make the SOP/EUDs (template) easier to create, easier to review, more likely to be utilized by our customers (meet their needs)
- 14 HMW combine the SOP/EUD?
- 15 HMW create better relationships and communication with stakeholders to ensure IT services and processes are easy to find and understand
- 16 HMW ensure the correct measurement metrics are in place in order to inform decision making, showcase value, and measure effort
- 17 HMW... create a process around the intake of 'work' (define this term) that defines priority and timelines while initiating metrics to showcase level of effort (LOE)?
- 18 HMW provide IT tools and systems to staff in a way that fits within staff's current workflows
- 19 HMW improve our training and marketing/awareness for stakeholder so that they gain knowledge needed to enhance their productivity
- 20 HMW provide ongoing training for IT tools and systems so that staff feel empowered to use them

IT Future-State Process

The resulting process map served as a holistic blueprint, integrating stakeholder-facing interactions with operational efficiencies, while also functioning as a shared tool for teams to analyze, prototype, and iteratively refine the service experience. This foundation was positioned to guide future solution development, ensuring a cohesive and customer-centric approach.





AAO IT's Workshops

IT Service Redesign

Friday Workshop

6 IT managers and staff gathered on Friday to ideate and dive deeper into some team specific challenges they were facing.



WORKSHOP

AGENDA

AMERICAN ACADEMY
OF OPHTHALMOLOGY®

7 hours
10a-5p PT

March
7th

Welcome

10a

15 Min

Ice Breaker

10:15a

30 Min

Presentation

10:45a

30 Min

Quality of Work Activity

11:15a

60 Min

Lunch

12:15p

60 Min

Tech. Documentation Activity

60 Min

Break

2:15p

15 Min

Ideation Activity

2:30p

90 Min

Stakeholder Workshop Prep

45 Min

Closing and Cleanup

4:45p

15 Min

IT Service Redesign Monday Workshop

Co-design workshops proved invaluable as they fostered collaboration, creativity, and user-centered solutions by involving diverse stakeholders, which ensured more effective and inclusive outcomes.

"Yes, and..." Ice Breaker

Stakeholders said "yes, and," building upon each others ideas, setting the stage for the workshop, and fostering an environment of creativity.

Maximize Project Value at Idea Inception

Using described information gathered at project inception, stakeholders ideated on ideal value-based project outcomes, and co-designed a "Proposal Brief" to incorporate these ideas.

Enhancing Documentation Usability & Effectiveness

Explored how IT documentation is used and created, by stakeholders ideating on processes, standards, and awareness for quality and usage.

Improved Communication

With an eye towards communication touchpoints, stakeholders ideated on and refined ideas to improve the timeliness, helpfulness, and transparency of IT's communication.



WORKSHOP AGENDA			7 hours 8a - 3p PT	March 10th
Welcome + Ice Breaker	8a*	45 Min		
Context Presentation	8:45a	30 Min		
Break	9:15a	60 min		
Idea Inception Alignment	9:30a	2 hours		
Lunch	11:30a	50 min		
Document Usability	12:20p	60 min		
Break	1:20p	15 min		
Improved Communication	1:35p	70 min		
Closing	2:45p	15 min		

*Times are estimates and subject to change

Key Insights and Themes

Everyone at AAO is facing similar challenges - stakeholders involved came to a collective realization that that the issues at hand were not isolated to specific departments but were systemic across the organization. Having collaborated to address these broader, interconnected problems, they demonstrated the potential to implement comprehensive solutions that could significantly improve the overall working environment for everyone involved. This unified approach emphasized the importance of collective action in driving meaningful, organization-wide change.

Culture	Visibility	Ownership	Clarity
Stakeholders recognized that enhancing processes necessitates a cultural shift, driven by strong support from leadership, to strengthen IT's ability to innovate and deliver impactful outcomes.	A consistent theme was the need for greater visibility into IT's goals, project work, and documentation, not only within IT but across initiatives that impact AAO's resources and budget. There is value in having a holistic view to align priorities, and avoid duplication.	There was a highlighted need for clearer project & task ownership, defined roles, and points of contact for projects, as well as earlier involvement of the right stakeholders to support project idea generation and brainstorming phases	Due to lack of sufficient insight into cross-departmental needs, made it challenging for stakeholders to identify who should be involved or what requirements must be clarified to properly define, scope and initiate projects—a complex issue that requires further analysis and exploration

Next Steps

The IT-led workshops marked a pivotal step in the ongoing evolution of their Service Improvement initiative. Building on insights from prior efforts and stakeholder feedback, IT outlined a series of strategic next steps to drive meaningful progress in refining processes and enhancing services.

Idea Sizing

In a series of collaborative sessions with consultant, IT will synthesize ideal future state for processes related to project development, ownership, and documentation
(4 sessions, 2 weeks)

Activating Progress

IT will create an Activation Framework that details how they interact with internal and external stakeholders, describing the processes and tools utilized.
(4 sessions, 2 weeks)

Experience Wrap Up

IT will engage in reflection of their learnings during the collaboration with CREATE Strategy over the past 6 months.
(1-2 sessions, 1 week)

Post Workshop(s)

Immediate Actions

Debrief

Note key takeaways immediately after workshops. Insights can get lost quickly from your brain.

Gather

Collect everything from workshops. Don't leave key insights behind! (photos, physical outputs, etc.)

Digitize

Put everything you've collected into a digital format for easy access.

Analysis & Synthesis

Affinitize

Collect themes within activities to create insights and patterns. Then look for similar insights between activities to develop overarching patterns.

Create Themes

Take insights and takeaways and draft themes and summaries of activities and sentiments.

Compare

How do the affinitizations and themes match with your initial takeaways? Does that reveal anything else?

Make a Presentation

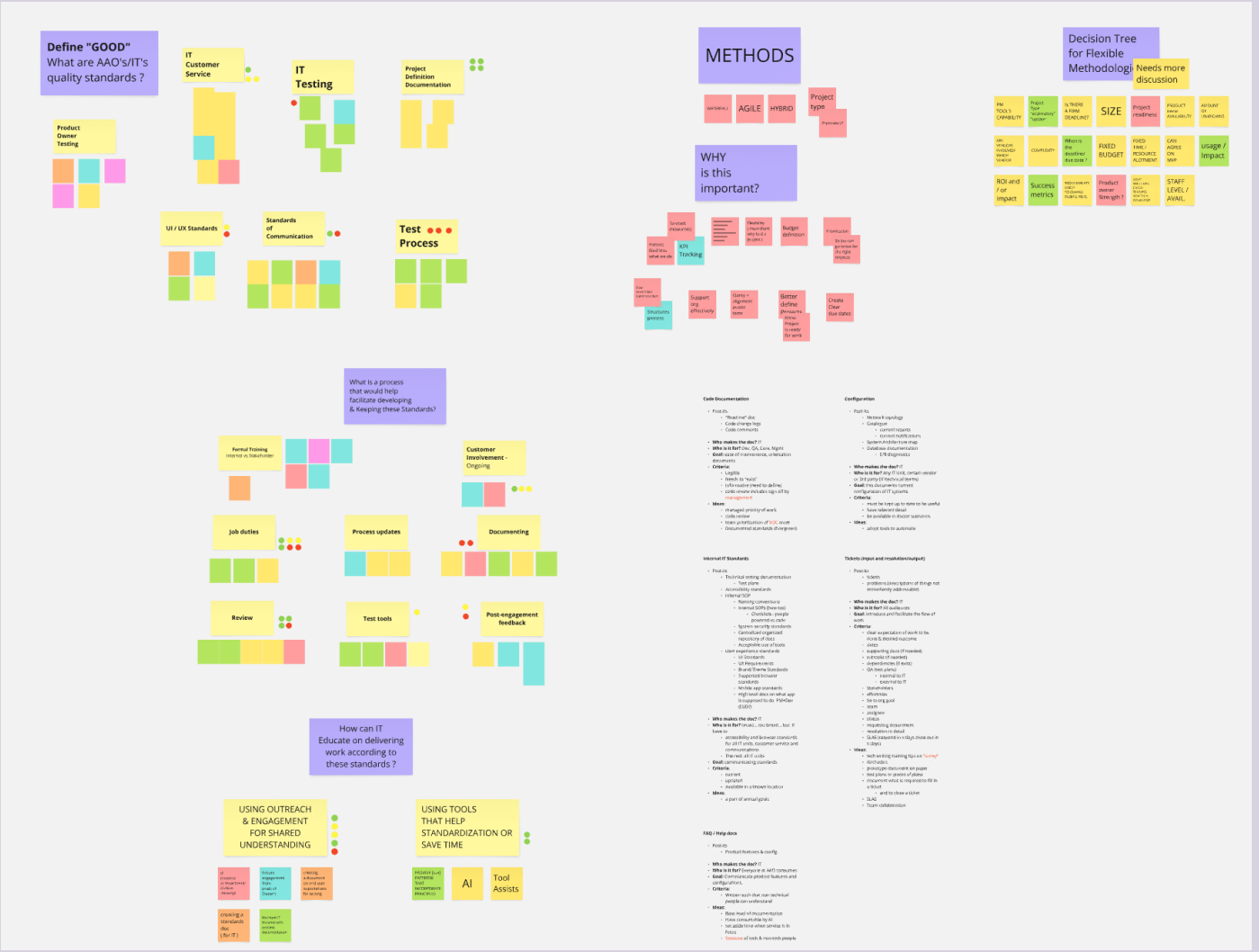
Develop a takeaways presentation for stakeholders that includes:

- **Workshop Agenda(s)**
- **Goals/Outcomes - Why you did the workshop(s)**
- **Methods - What was accomplished and how**
- **Key Takeaways**
- **Next Steps**

Workshop Synthesis

CREATE Strategy provided the AAO IT team with post-workshop steps to guide through their workshop synthesis process. During and between working sessions, the AAO IT team digitized, affinitized and synthesized the workshop findings into key themes and groupings.

They developed a workshop takeaway presentation for their stakeholders from their findings, as well as began developing co-designed solutions to address their How Might We challenges.

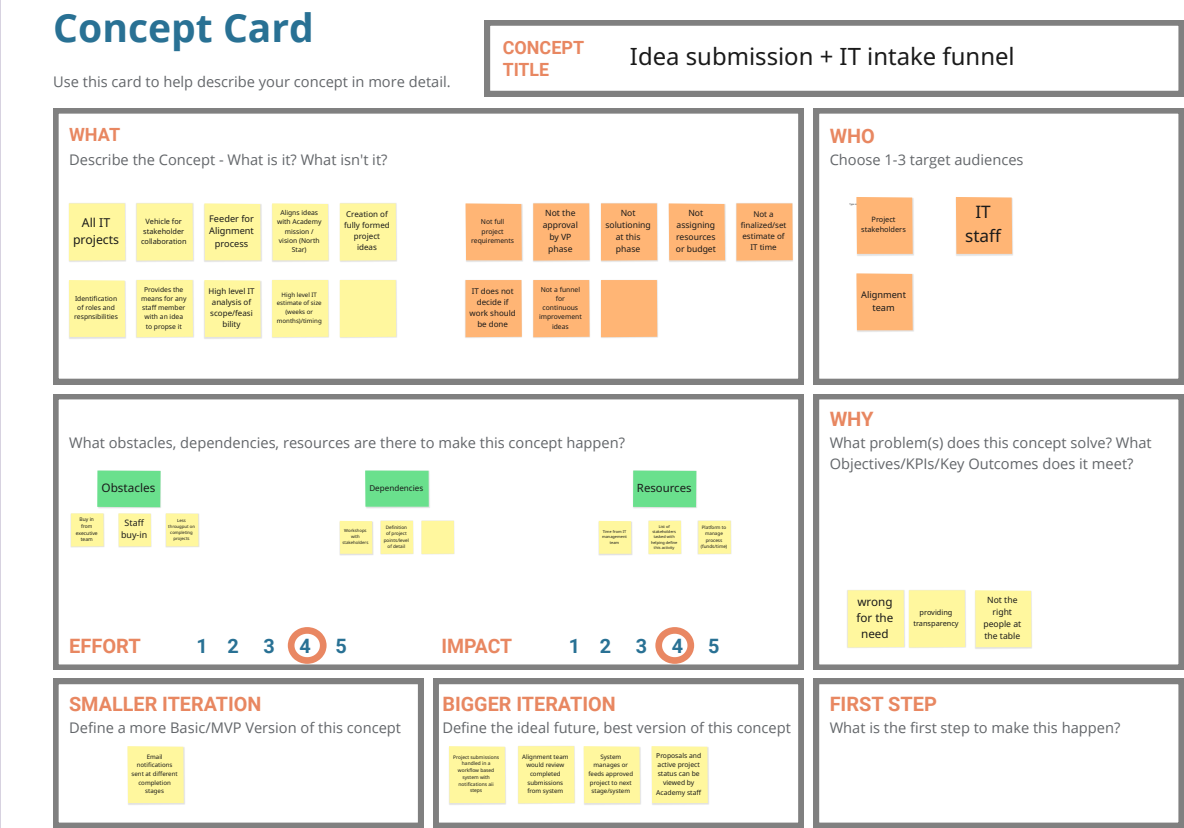


Idea Sizing & Concepts

After analysis, the IT team organized the co-designed solutions through **Idea Sizing**—a process of grouping and prioritizing ideas to determine which initiatives to pursue first.

The team refined these ideas into well-defined concepts with clarified objectives, key stakeholders, execution obstacles, dependencies and resources as well as expected effort and impact, ensuring alignment on implementation. They accomplished this using the **Concept Card framework**.

These concept cards allowed them to move into the final phase of their program with CREATE Strategy, where they developed a structured **Activation Plan** for each concept initiative, complete with clear scope and measurable outcomes.



Summary

During Phase 3 the team successfully mapped an end-to-end future-state process map, identifying key opportunity gaps and potential How Might We's (HMWs) to co-design with stakeholders in workshops. The stakeholder workshops achieved the dual outcomes of - aligning cross-team understanding and priorities and fostering deeper collaboration among experts. All effectively breaking down silos to leverage collective insights. Through their rigorous analysis the team developed a clear prioritized concepts, forming the foundation of multiple IT initiatives designed to improve process governance, stakeholder communication, cross-functional collaboration, and organizational alignment across AAO.



When to Use Workshops

The following are some signals that this is the right tool to use in a situation:

- Identify how a planned solution or change will impact departments or roles.
- Engage diverse users affected by new ideas and outcomes.
- Develop strategies to drive adoption of change.
- Solve highly complex problems with cross functional teams.
- Align direction, vision, mission, goals, and/or tasks across silos.
- Clarify roles, responsibilities, and engagement.
- Increase visibility and awareness of a project, initiative and/or change.

"How can I stay informed about what's going on?"

"How will this impact people, and will they actually use it?"

"Are we duplicating work or wasting time on similar tasks?"

"What critical inputs are missing from what we are creating?"

"Who owns this part of the process, and how does it work?"

"What's the best way to solve this problem?"



Synthesis & Idea Sizing

Phase 4

Mar '25 - Apr '25

Objective:

Develop a clear plan on how to approach and make progress towards process improvements

Activation Framework 101

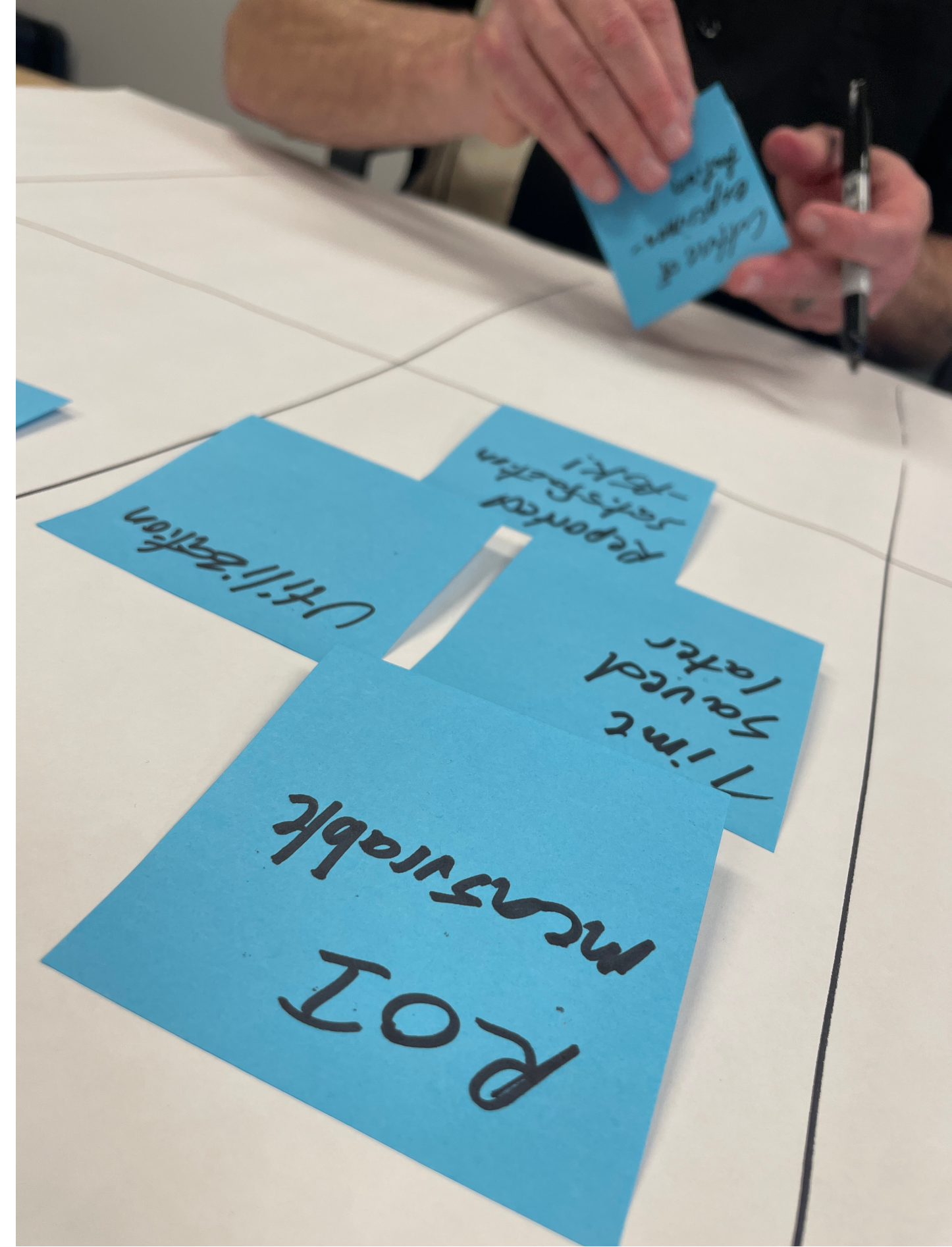
An Activation Framework is a structured approach to making measurable progress toward a future-state initiative, service, or experience providing teams with clarity, organization, and momentum, enabling them to align, collaborate, and drive progress, ensuring continuous evolution while directly informing organization roadmaps and project plans.

Activation Framework: Making Progress

How do we develop the clarity, organization, and momentum needed to help organizations create the structure and collaboration necessary for activated progress?

Progress can be difficult to initiate, hard to maintain, and painful to calculate and measure due to:

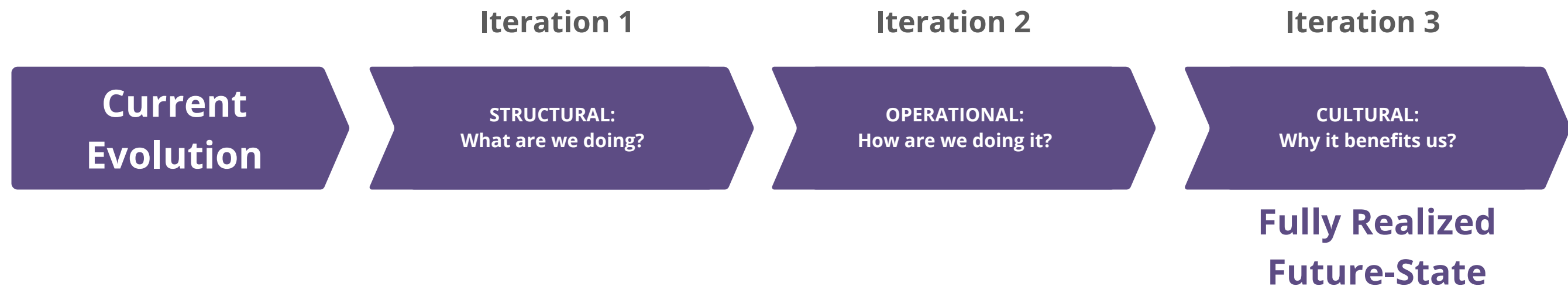
1. Roadmaps and other strategies lack tactical planning
2. Siloed departments and teams
3. Misaligned or poorly structured project planning
4. Disconnected upstream and downstream inputs
5. Decision bottlenecks



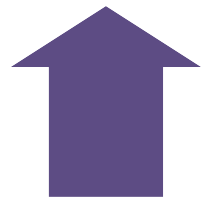
Activation Framework

An **Activation Framework** shows how to make active progress towards building a target future-state product, service, or experience by breaking it into components and functional iterations.

An Activation Framework models the phased roll-out of an initiative, starting with the near-term and ending with the fully-realized North Star experience. Unlike roadmaps that are long-term and strategic, the Activation Framework focuses on tactical evolutions of an initiative. The framework will inform roadmaps and project plans.



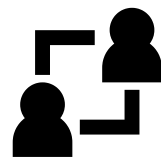
Value of an Activation Framework



INCREASES



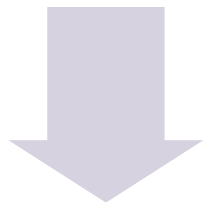
Clarity



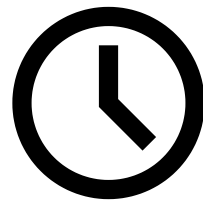
Collaboration



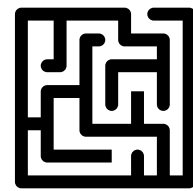
Preparedness



REDUCES



Time



Complexity



Cost

What it IS

- Clarity around significant steps that need to occur to achieve progress
- Defined iterations so that work isn't left open ended
- Shared tool that provides all stakeholders with clarity about steps in the process, ownership, and expectations for success and momentum
- Provides a collaborative and holistic approach that spans anyone involved in the work to be able to assess and adjust steps based on external factors

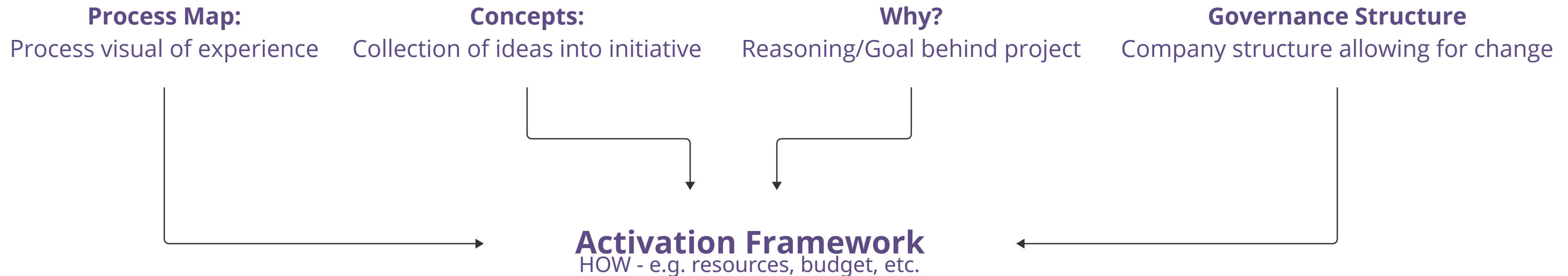
What it ISN'T

- Does not capture end-2-end detail process or workflow
- It is not a map or document for systems management
- Does not capture sentiment, experience, or customer journey

What You Will Need

Activation Framework's help develop the HOW when it comes to making progress. To build one you need:

- a clear and aligned process
- Opportunity gaps & ideas turned into concrete concepts and initiatives - clearly defining the who, what, why, different levels of iteration (MVP vs ideal future state), etc.
- Clear objective/goal behind project
- Governance structure



Anatomy of an Activation Framework

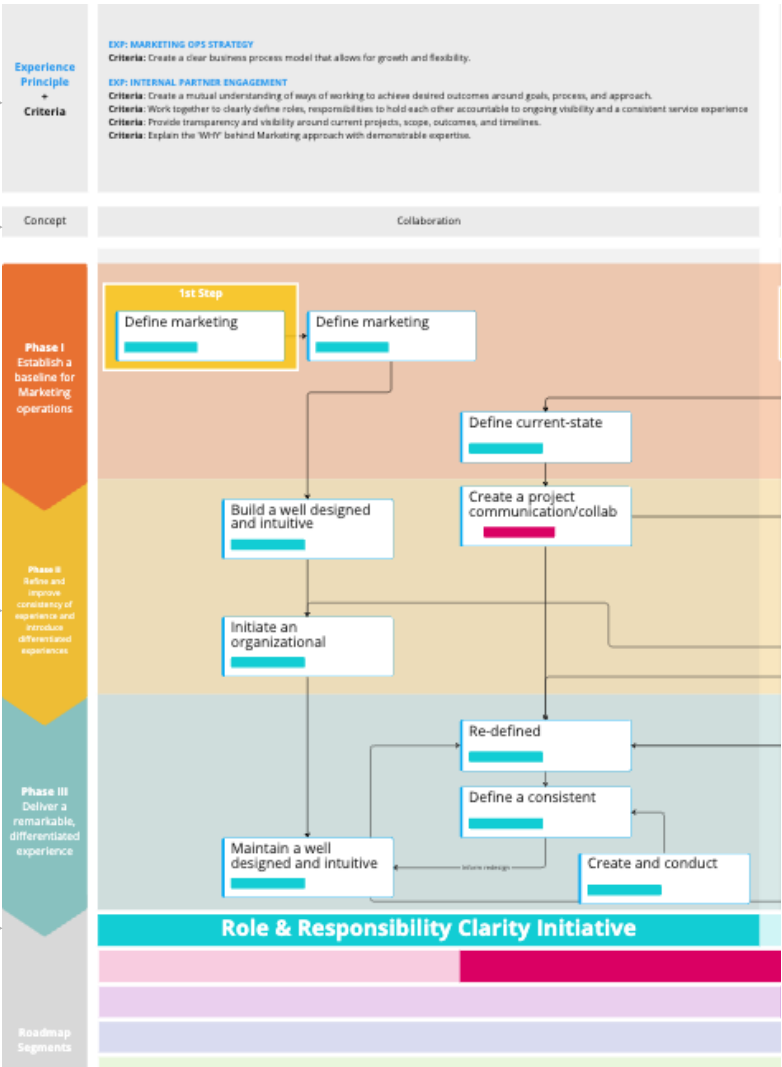
A strategic initiative can become large and unruly, often needing to be broken down into digestible elements that allow for more tactical planning and execution.

Metrics & other
success criteria

Components

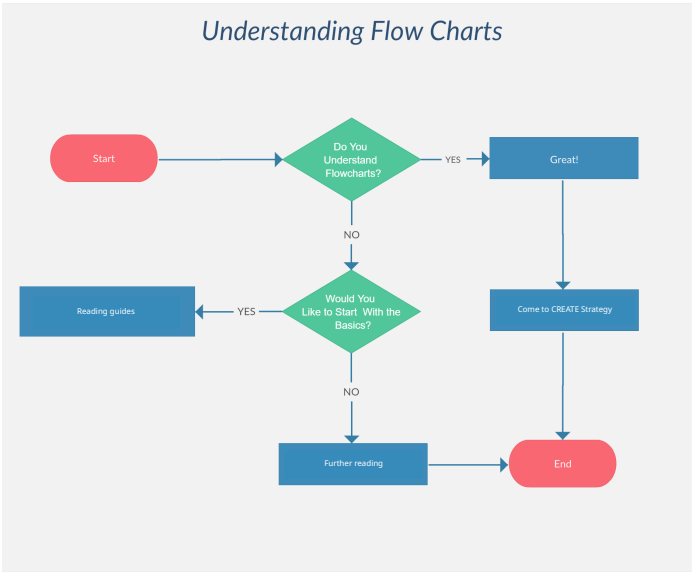
Iterations/Phases

Roadmap, RACI, Etc.



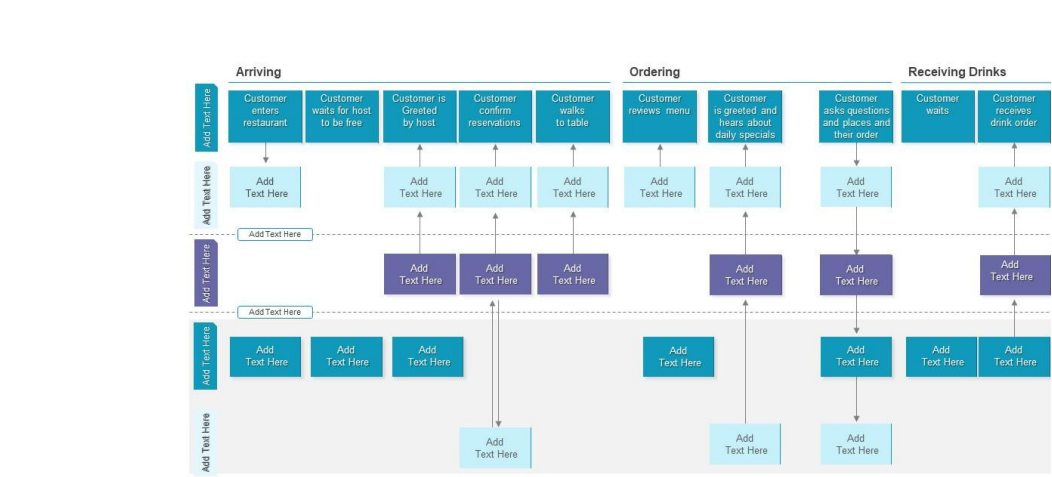
On the Vertical axis the
framework showcases
how a concept evolves
across the three
Iterations.

How Activation Framework Differs



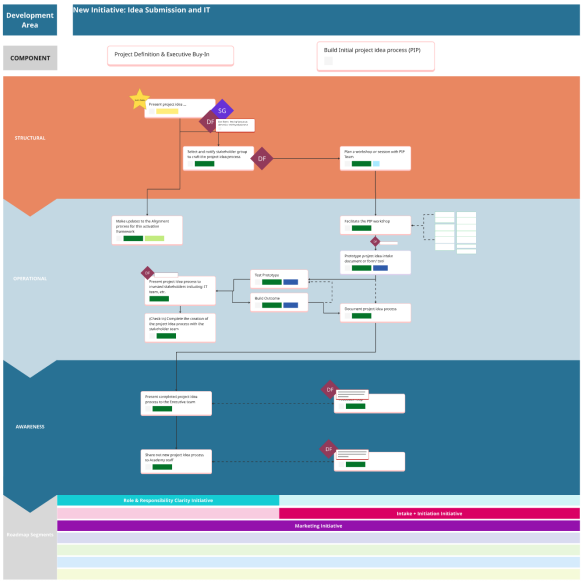
Flow Chart

- Usually one process only
- Allows for exceptions
- Action focused
- Identifies process only



Process Map

- Usually one, could include multiple
- Focuses on "happy-path"
- Time, people and systems focused
- Identifies opportunity gaps



Activation Framework

- Includes multiple processes
- Focuses on transition (change mgmt, going from current to future)
- Identifies upstream and downstream dependencies

Examples

Opportunity

HMW develop a process that would help facilitate developing & keeping team standards?

Idea

Outreach and engagement program(s) to train staff on projects, services, etc., across the organization

Concept

Explains what initiative is, why it needs to be done, LOE, and what the future vision is for the concept

Elements Into Action Steps

Strategic initiatives need to be organized into all the **Components** that support it. What an component consists of is dependent on the scale of the initiative. Components will placed on the framework from left to right in order of PRIORITY and DEPENDENCY

Each Component will be broken down into the action steps that stretch from the beginning steps of planning through to the final stages of adoption.

Concept/ Component

WHAT IS YOUR CUPCAKE?
Describe what you could make and test ...

WHAT WILL YOU MAKE

What aspect of the service will you make in its ideal form?
Internal partner for functional group (FG) and associated intake for other stakeholders.

WHAT WILL YOU TAKE

What aspect of the service will you create temporary solutions for to ensure it later stages?
- developing email alert
- update sharpoint to point people in the right direction
- set up for traffic control
- trainee: Community

KEY OUTCOMES

What benefits will STAKEHOLDERS receive?
- ease of doing business
- consistent communication
- address frustration
- 2017/18 decision making
- reduced distraction

STAKEHOLDERS - WHO IT IMPACTS

Who needs to help make and deliver the cupcake? Why do you need immediate buy in from to make the cupcake?
Kathy Johnson

WHAT PROBLEM DOES THIS SOLVE

NAME YOUR CUPCAKE:
Intuitive Intake

WHAT IT IS/ WHAT IT ISN'T

- A mess
- Suggestion box

- directions
- media
- starting point
- reference guide

OBSTACLES TO OVERCOME

- Resources
- Communication to a massive audience
- Breaking old habits- Change Management

HELP US UNDERSTAND HOW THIS CAN EVOLVE AND SCALE OVER TIME

WHAT'S THE CAKE?

Describe what YOU THINK COULD BE ACCOMPLISHED IN A YEAR...

Write here... CAKE

What is the step of evolution for the cupcake? What is the "in between" step before reaching its final form?
Understand - Response Guide
Current - Facilitate Self Service
Future - Update Sharpoint
Release/Themed - Strategic "Presence"
Full implementation

Timeline

WHAT'S THE WEDDING CAKE?

Describe what YOU THINK COULD BE ACCOMPLISHED IN 3-5 YEARS

Write here... WEDDING CAKE

What aspect of the service will you make in its ideal form?

This is accomplished in a year

Action Steps

```
graph TD; A[Path to point of] --> B[Assessment of]; A --> C[Define intake process]; B --> D[Committee to define]; B --> E[Define project prioritization criteria]; C --> F[Define future-state]; D --> G[Process to review and]; E --> H[Introduce]; G --> I[Establishing a group of];
```

CREATE Strategy CONFIDENTIAL

Dividing Iterations Into Thirds

Start planning each Component by thinking about it in its fully-realized future state. It is recommended to backcast and start with the long-term (North Star) and work backward – breaking into three fully functional phases.

Pairing metrics to each action item, or Iteration + Component section creates alignment as an organization on the key objectives and desired outcomes.

Iteration 1		Iteration 2	Iteration 3
Iteration 1	< A series of actions that initiate the journey to a future-state >	< Each Iteration should be an 'MVP' - a fully functional entity on its own >	<ul style="list-style-type: none">ACTION ITEM 1ACTION ITEM 2ACTION ITEM 3
Iteration 2	< A series of actions that drive implementing the actions >	< Determine what 'Done' is for each evolution, develop metrics for them >	<ul style="list-style-type: none">ACTION ITEM 1ACTION ITEM 2ACTION ITEM 3
Iteration 3	< A series of actions that fulfill a realized future-state >	< Determine important decision fulcrum points to assess for continuation >	<ul style="list-style-type: none">ACTION ITEM 1ACTION ITEM 2ACTION ITEM 3

Practical Application

How to work through the Activation Framework for greatest impact

Pre- Phase

//HOW TO BEGIN

- Create logical groupings of component that encompass a project, initiative, or body of work
- Each component should be divided into three sections made up of a series of action steps
- Each iteration should deliver a complete phase of the component
- Identify and convene the role or team responsible for delivering each component
- Choose a champion in leadership to guide the work, create a check-in cadence

During Phases

//INITIATE

- Discuss the cluster of actions cards, identify the action cards without dependencies in each component
- Understand dependencies between action steps (the arrows)
- With the team, translate the action cards into project activities on a project plan
- Identify enablers, accelerators, and blockers to your success
- Identify stakeholders, teams, or customers involved in the work and create a plan for engagement

Practical Application

How to work through the activation framework for greatest impact

During Phases

//ASSESS

- Create and convene with counsel governing the work and initiate decision fulcrum protocols
- Identify what worked, what didn't, and any key considerations or uncertainties for each component
- Based on the team's assessment determine what needs to change before moving forward in order to scale the work or move onto next steps
- Determine what the team has the capacity to commit to and if any additional team members, stakeholders or partners need to be involved in this new phase

// MEASURE

- Determine if the outcomes have met your pre-determined 'Done' criteria
- Determine success metrics for each iteration and markers that signal that the iteration is complete
- Determine how you will measure that success and end-of-iteration milestones
- Identify key decision fulcrum points to assess and make critical changes
- Determine if the final future-state iterations have met the markers for success

Post- Phase

// DIFFUSE + MAINTAIN

- Determine if the project is completed and scaled to desired future-state
- Identify communications needed to educate or create awareness of new outcomes
- Create processes and check-ins for the long-term maintenance of the project
- Determine how you will continue to measure the impact of the initiative
- Create markers or milestones to identify when the elements needs to be reassessed or updated

When to Use Activation Framework

The following are some signals that this is the right tool to use in a situation:

- Not sure how to get an initiative started
- Uncertain what to change/prioritize first
- Unsure of impacts and inputs into change
- Cannot make progress
- Lacking ownership and decisions making structure
- Not sure what the dependencies are

"How do we bridge the gap between our future vision and the steps to get there?"

"How do we get started? What do we do first?"

"What's stopping us from taking the next step, and how do we unblock it?"

"Why are we missing milestones or falling behind on the project?"

"Who/what is blocking forward progress and how can we expedite it?"

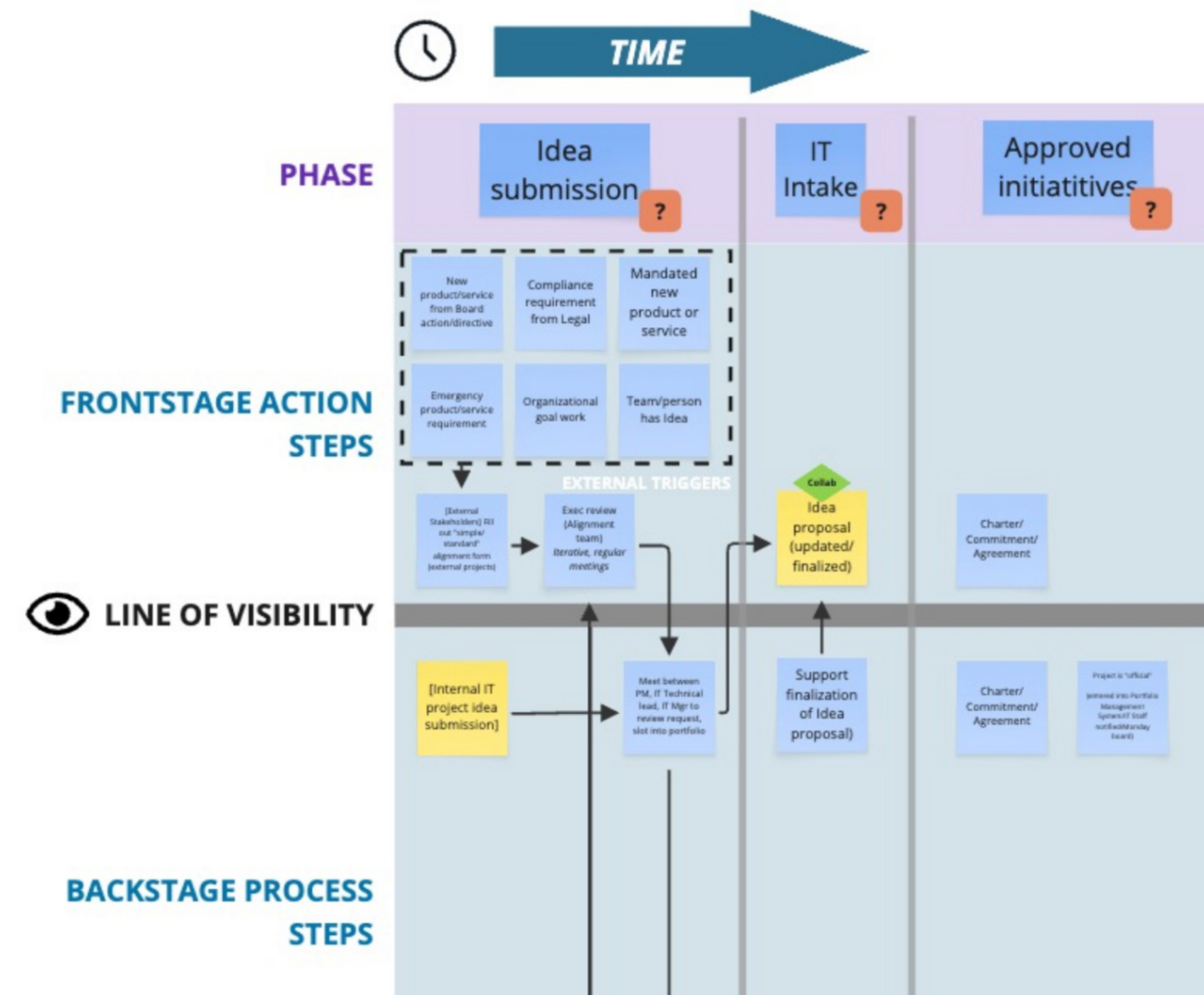
"What critical tasks remain before we can finish?"



Progress Activation for AAO Idea Submission + IT Intake Funnel

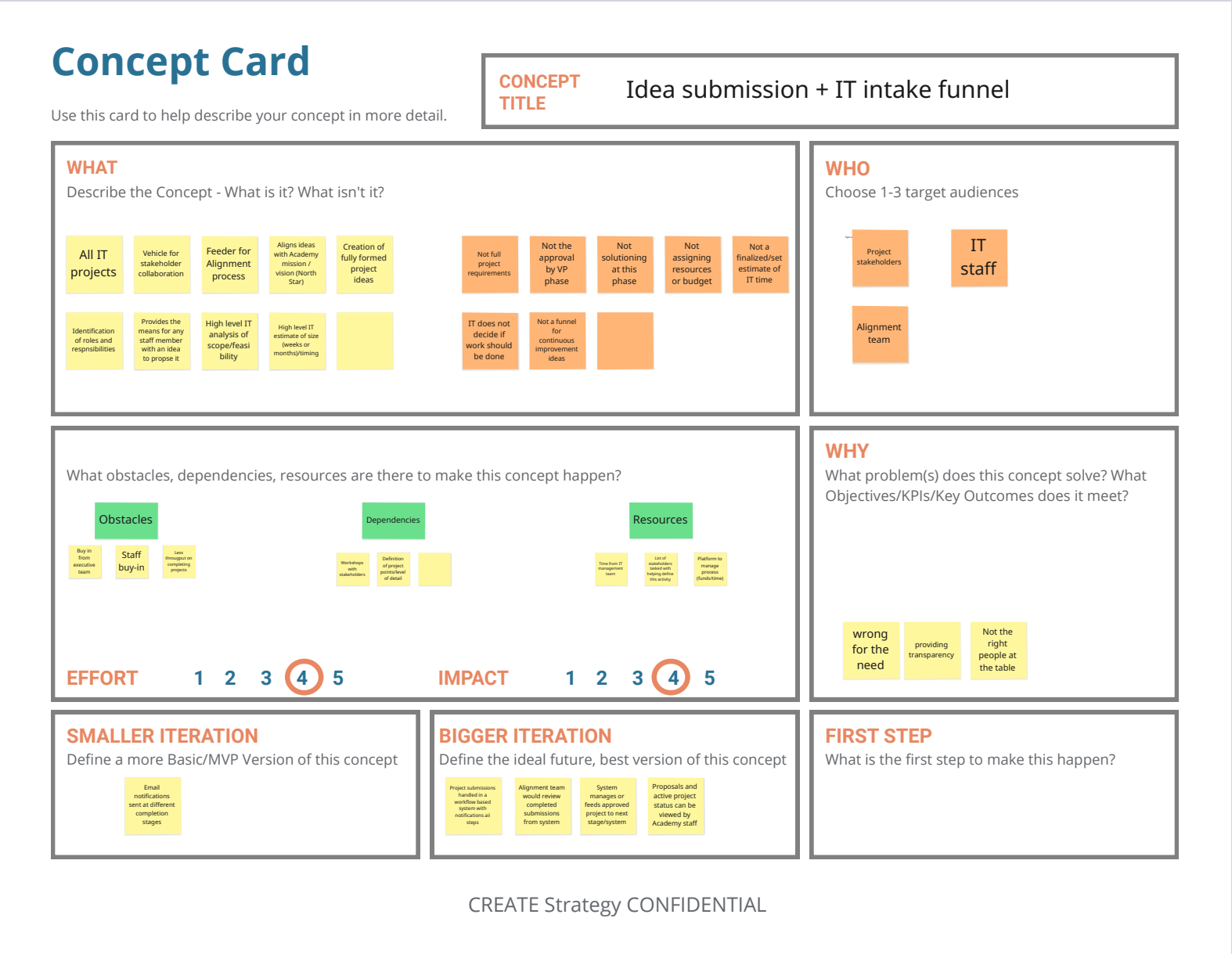
Idea Submission and IT Intake Funnel

Drawing from their ecosystem mapping, stakeholder research, and workshop insights, the IT team determined that co-designing an improved, transparent submission and intake process would deliver the greatest organizational impact for AAO. They prioritized this initiative as the primary example to develop into an activation plan with the CREATE team.



Concept Card

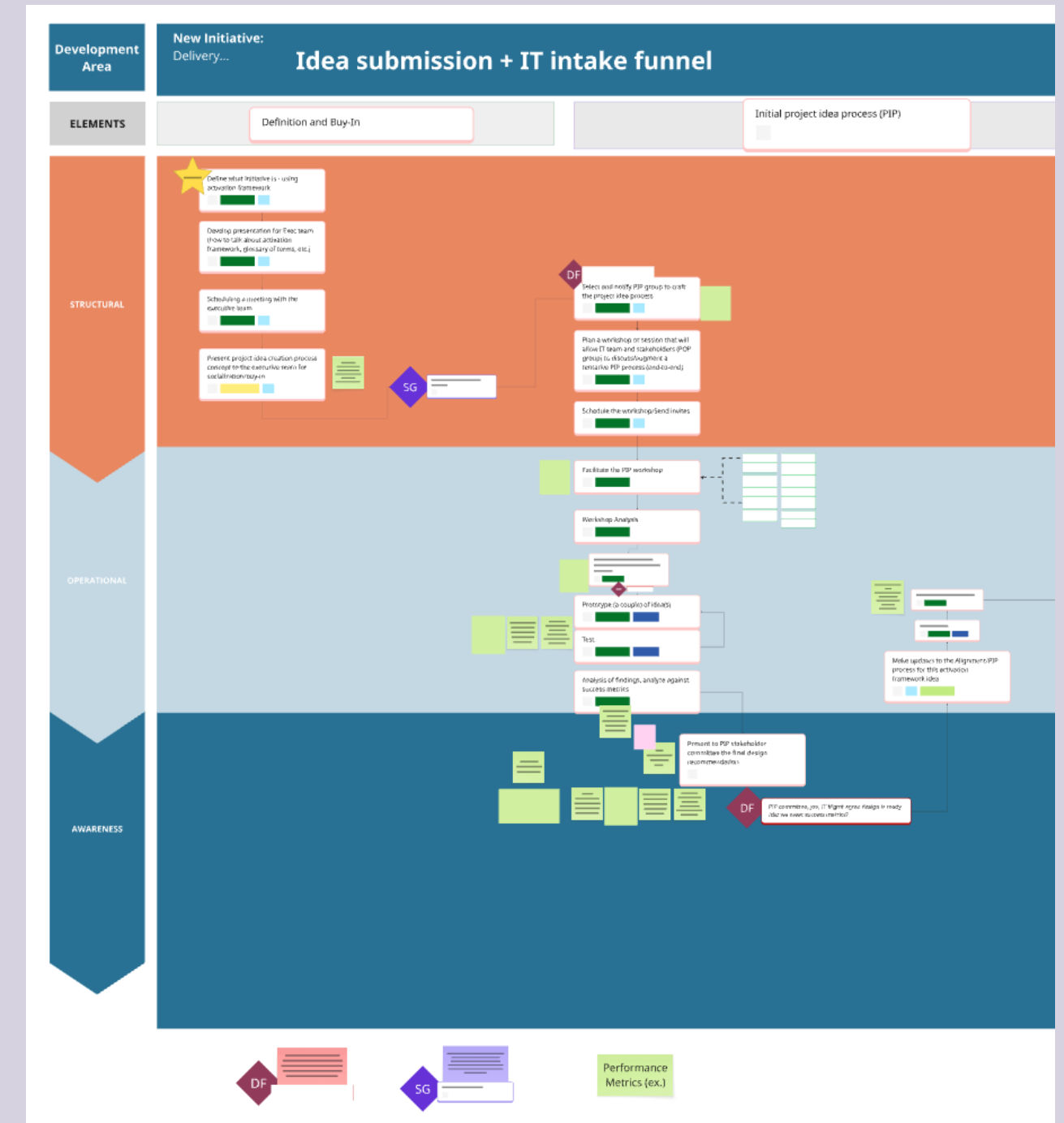
The team developed a **Concept Card** that enabled them to refine a few of their ideas into a well-defined initiative with clarified objectives, key stakeholders, execution obstacles, dependencies and resources as well as expected effort and impact. This concept card ensured team alignment by explicitly defining what the initiative encompassed and what it deliberately excluded.



Activation Framework

With CREATE Strategy, AAO developed a structured activation plan for this concept initiative with clear scope and measurable outcomes. The steps the AAO IT team took:

1. Wrote each action to be taken and placing them on the framework - within the element (part of the initiative) and evolution phase it falls within
2. Added RACI details within each action steps
3. Connected the actions through linear dependencies - left to right, but also right to left
4. Added decision fulcrums (DF) and stage gates (SG)
 - DF - important decision, no project blockage
 - SG - important decision that blocks project
5. Developed clear success metrics for each DF, SG and initiative (green post-its).

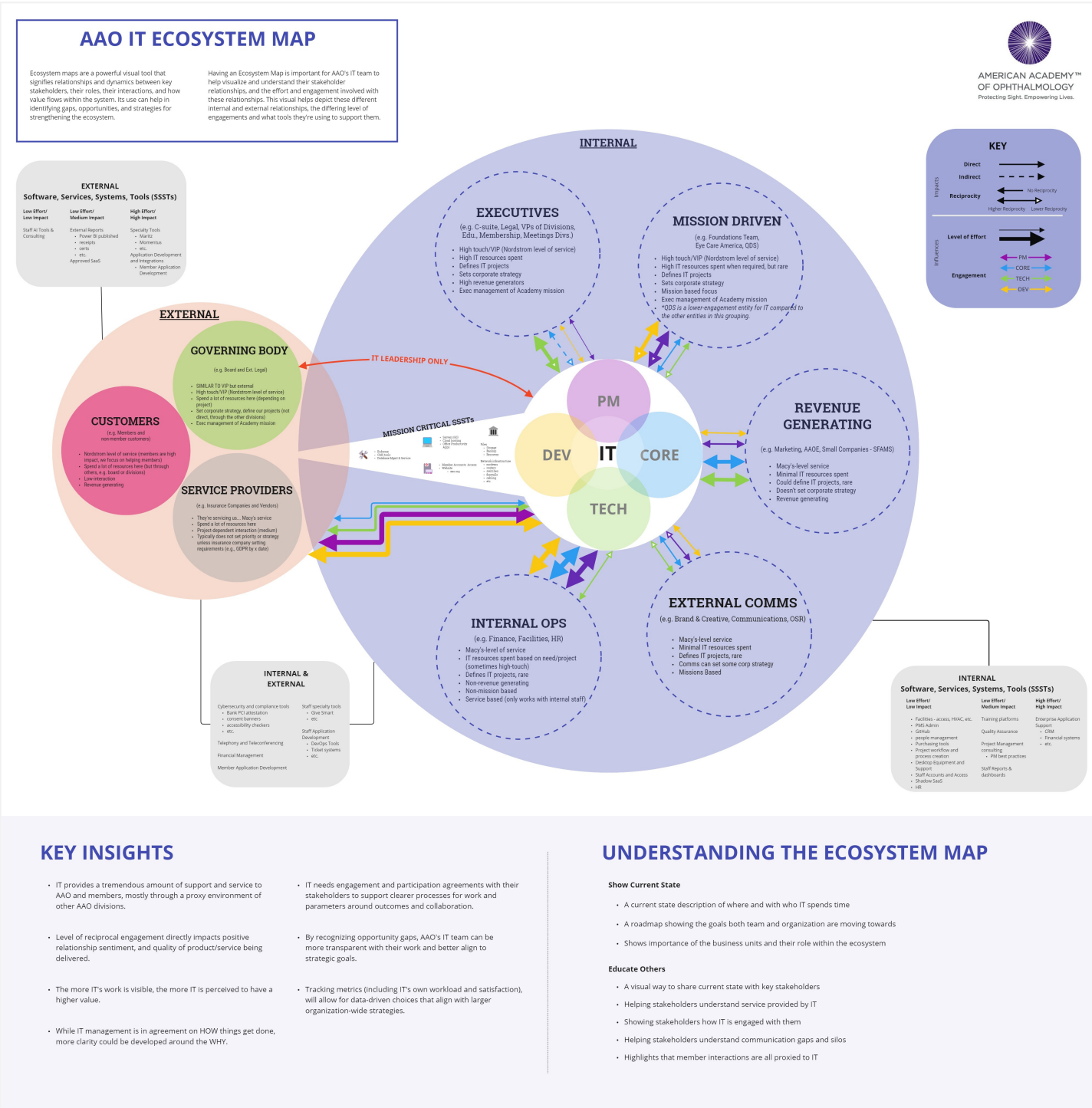


Appendix

Educational Resources

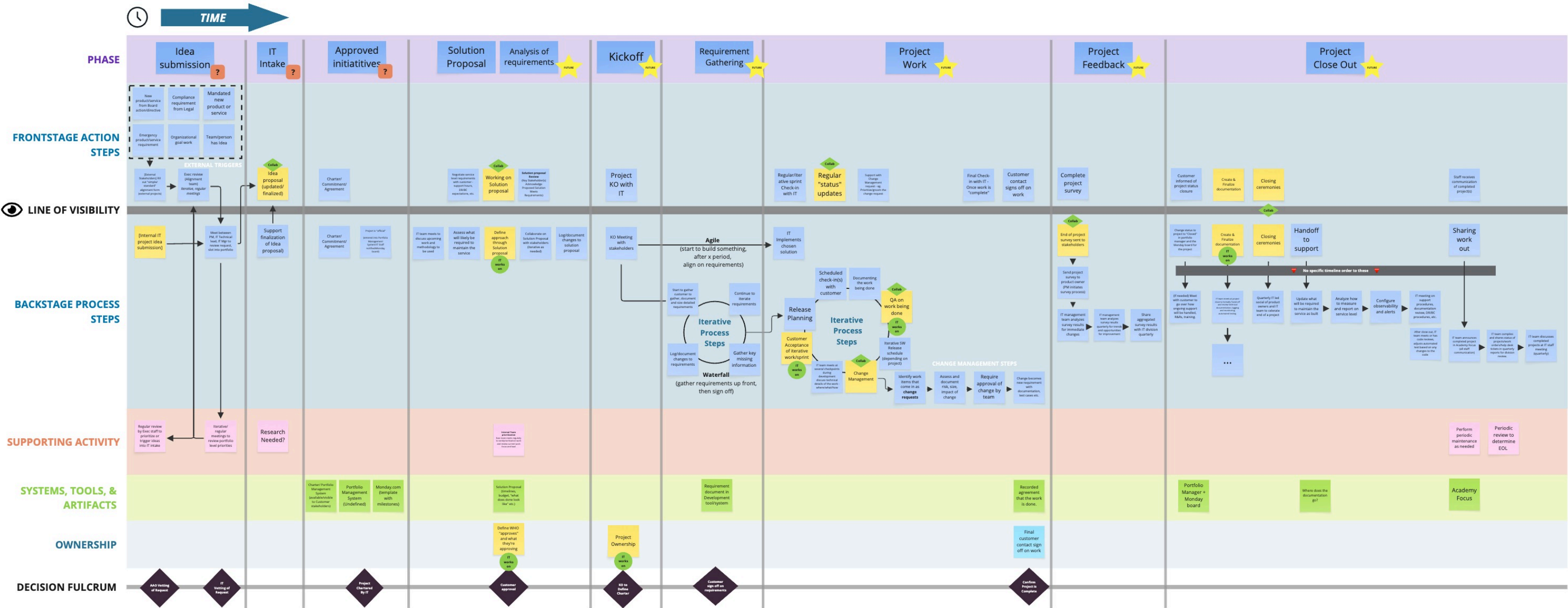
Ecosystem Map

Appendix



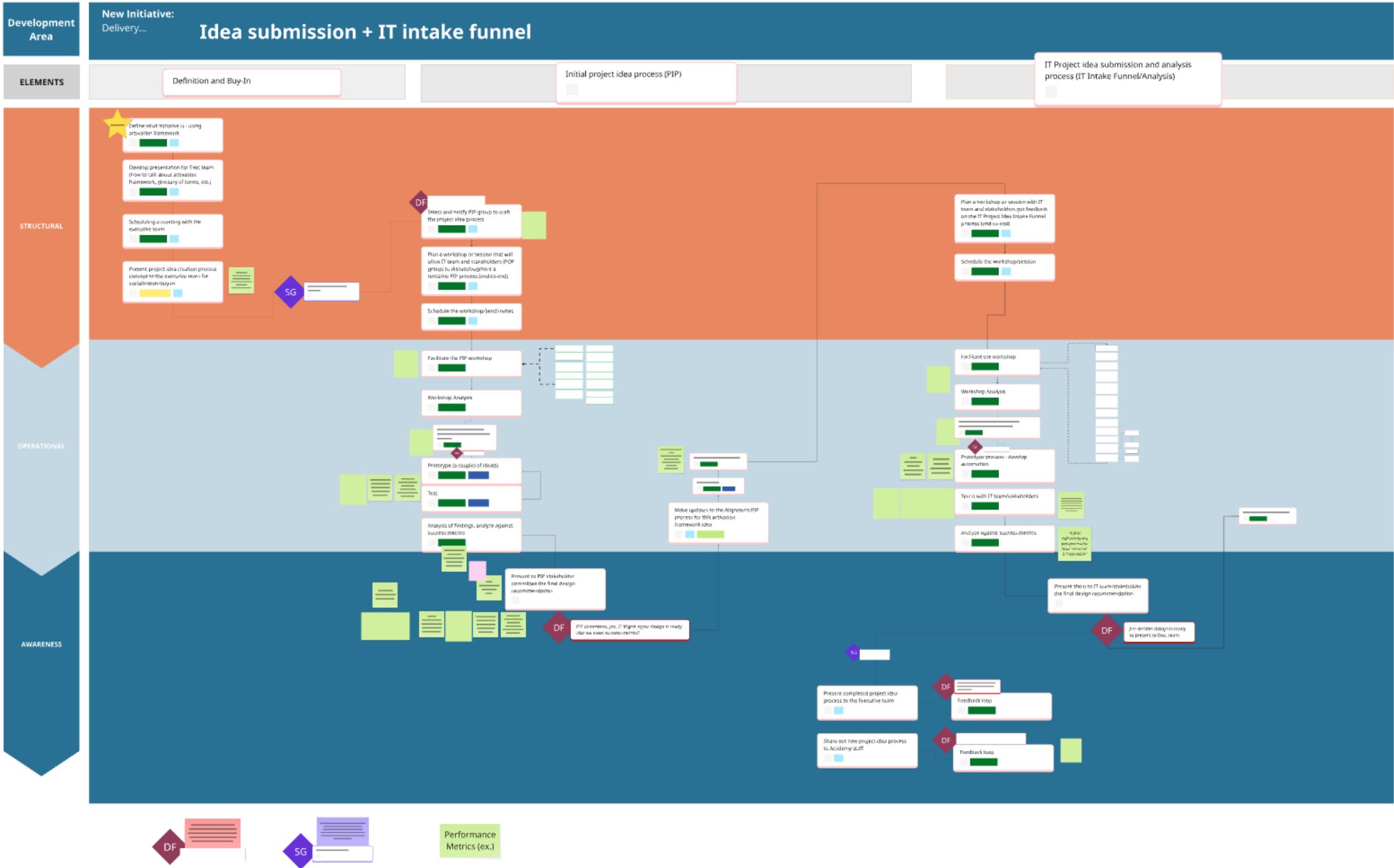
Process Map - Future State

Appendix



Activation Framework

Appendix



Links

Appendix

Research Guide

[AAO Research Plan - Phase 2.docx](#) (Link Sylvia had access too, might not be most up to date)

Research Note Taking & Analysis Guides

https://miro.com/app/board/uXjVL5UhJmc=/?share_link_id=782018681185

Facilitation

[Facilitating Research Interviews Best Practices Handout.pdf](#)

[AAO Facilitating Workshop Best Practices Handout.pdf](#)

TUTORIAL ON STICKIES CAPTURE

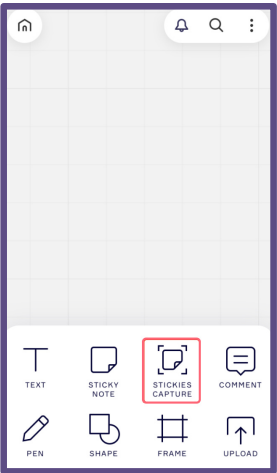
Miro How To (Mobile, Tablet and Web)
<https://help.miro.com/hc/en-us/articles/360017572074-Stickies-capture>

Appendix

Mobile

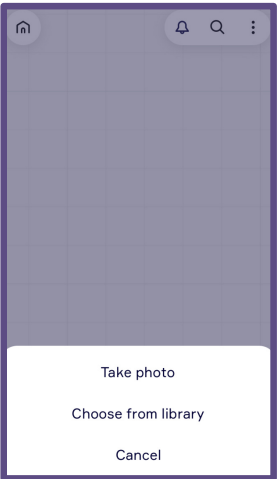
Open Board You Want Stickies On

Explore the toolbar and find the "Stickies Capture" option, which looks like a sticky note surrounded by "crop" corners.



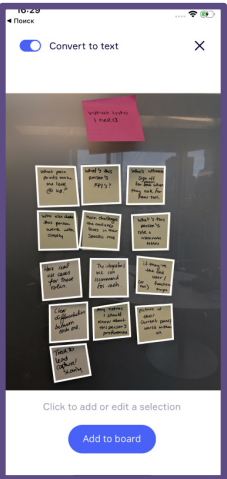
Choose or Take Photo

Only on mobile you can directly capture a photo in the moment, otherwise choose one from your existing library/folder structure.



Edit Stickies Captured

Miro will capture the stickies it sees. It does not always work correctly. Use the instructions below to improve your capture.



- To **ADD** a new outline box, click near the sticky note.
- To **EDIT** the size of an existing box, click into the existing box and it will allow you to change the sizing.
- To **DELETE**, click into the box and hit the "delete" button in the bottom left corner.

Add to Board & Double Check

Click "Add to Board" and you'll see all your stickies added.

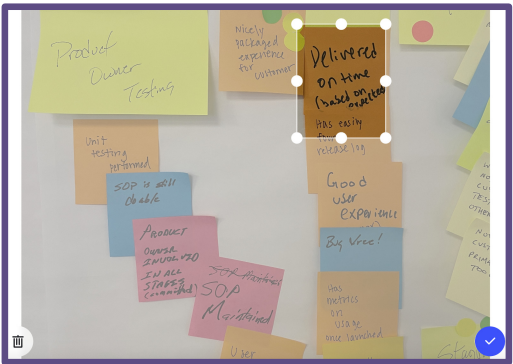
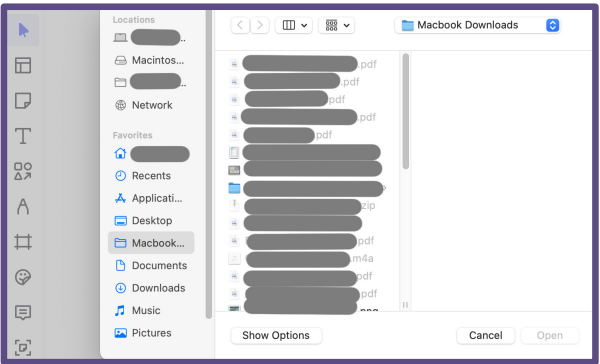
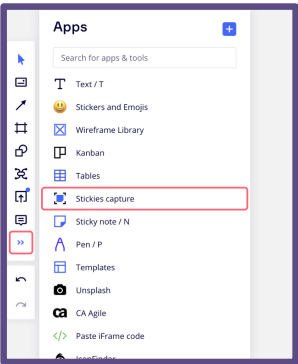
You will want to double check each sticky to make sure that the text was properly brought in as it does not always read handwriting very well. You might also want to edit size, shape and color of the stickies.



TIPS

- Make sure to turn on the "convert to text" option
- When taking your pictures it helps have your stickies separated, not stacked on each other
- When editing the shape of the box, the middle dots keep the rectangle, the corner dots make parallelograms

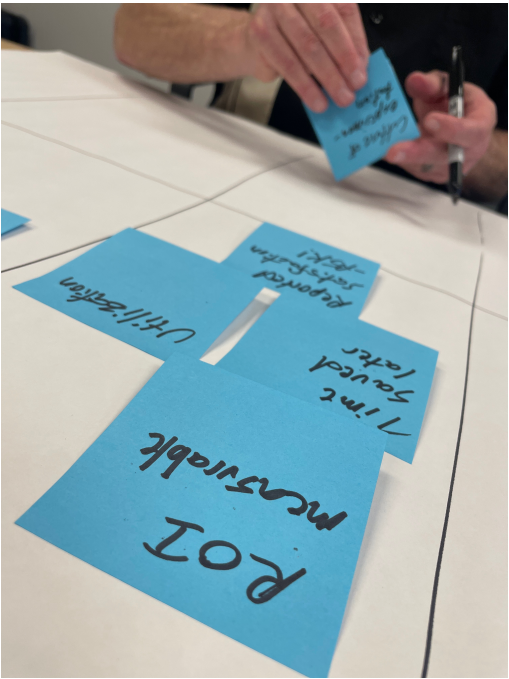
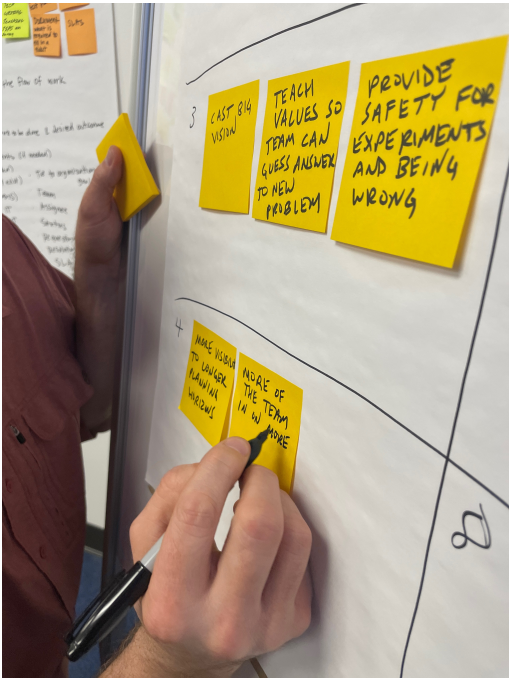
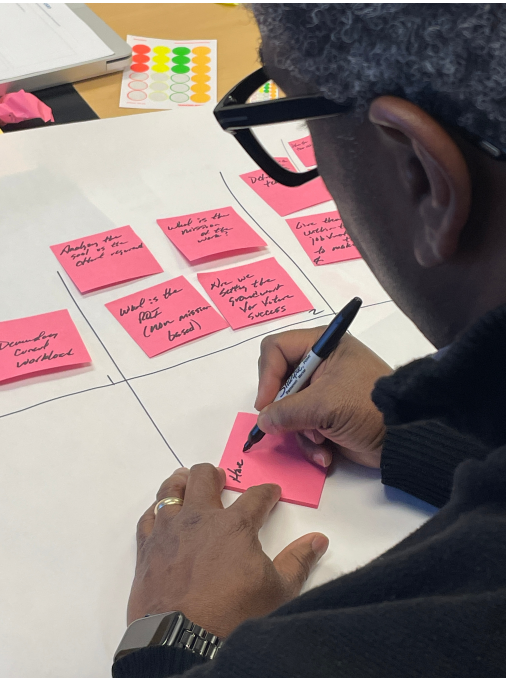
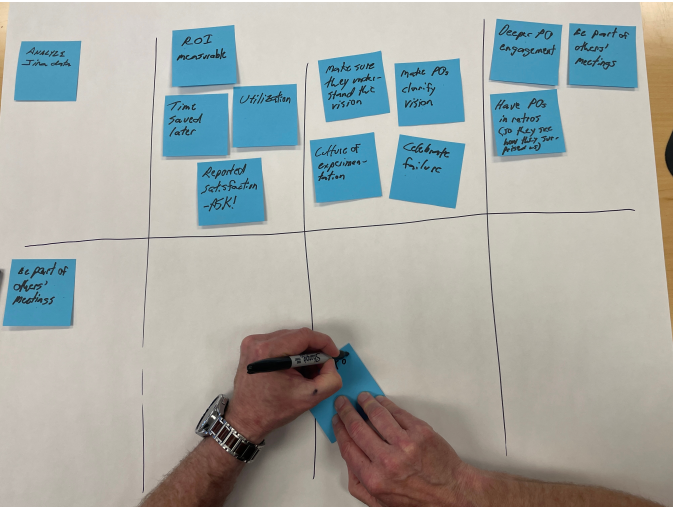
Desktop/Tablet



Pictures

Friday Workshop

Appendix

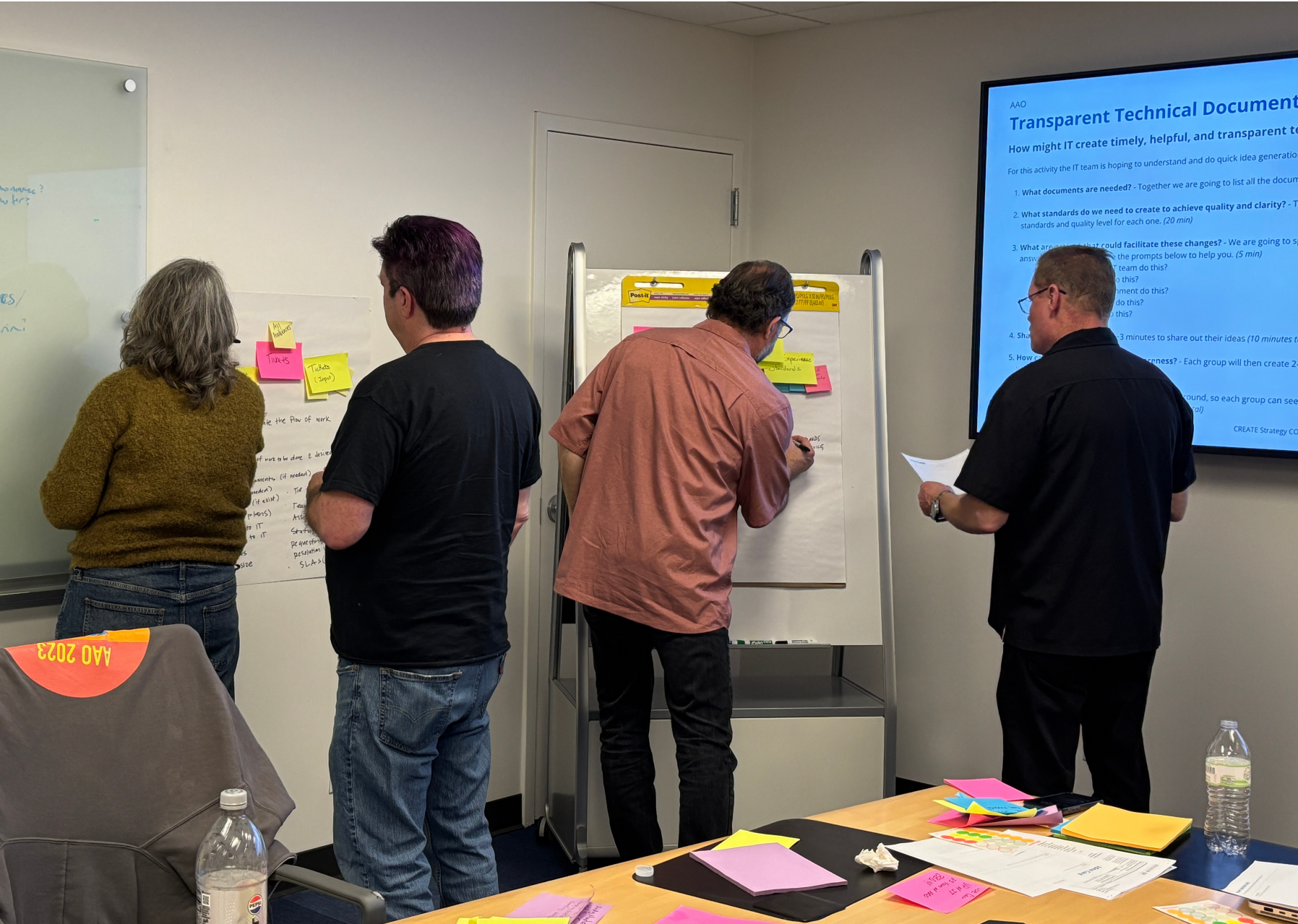


Pictures

Appendix



Pictures



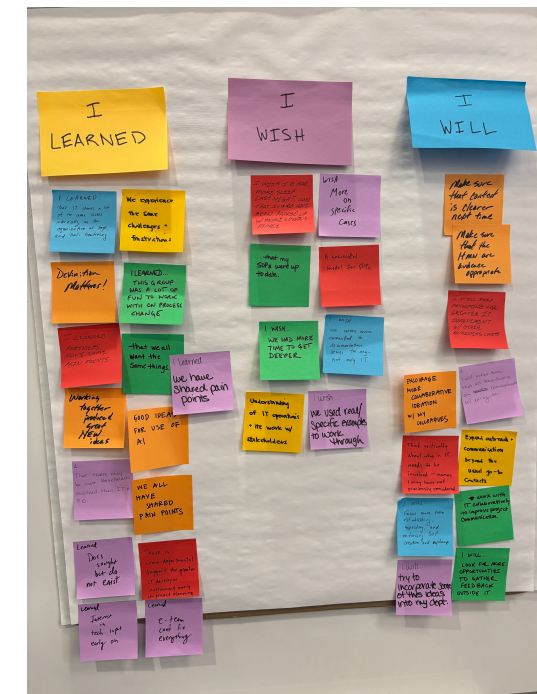
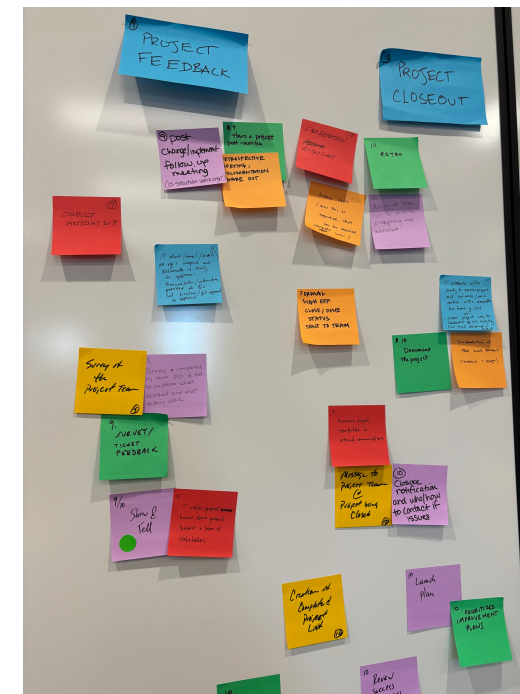
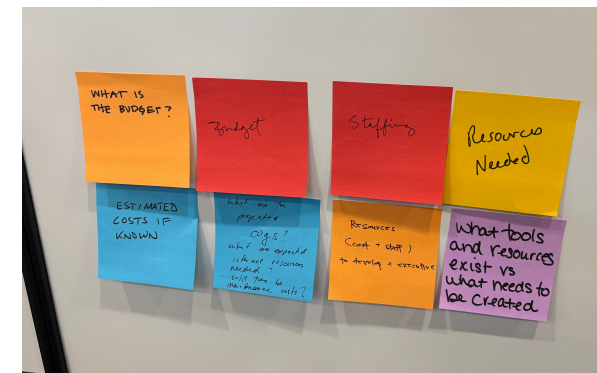
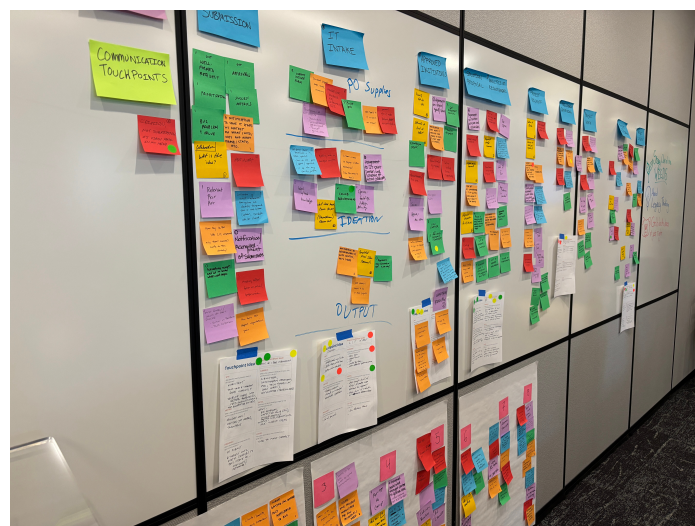
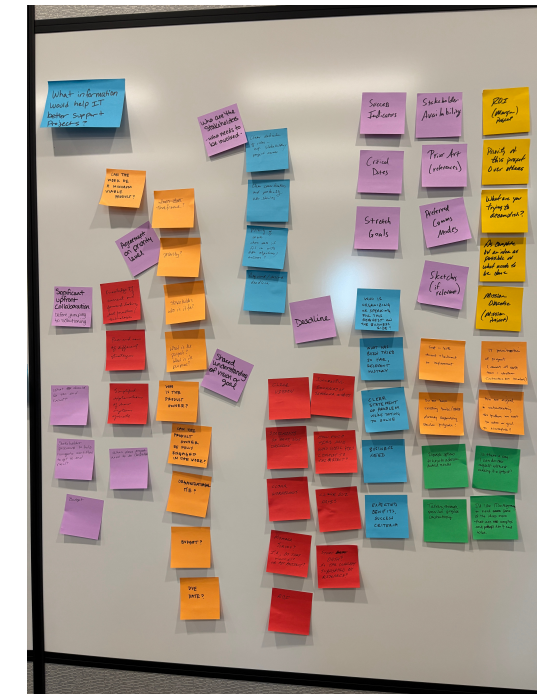
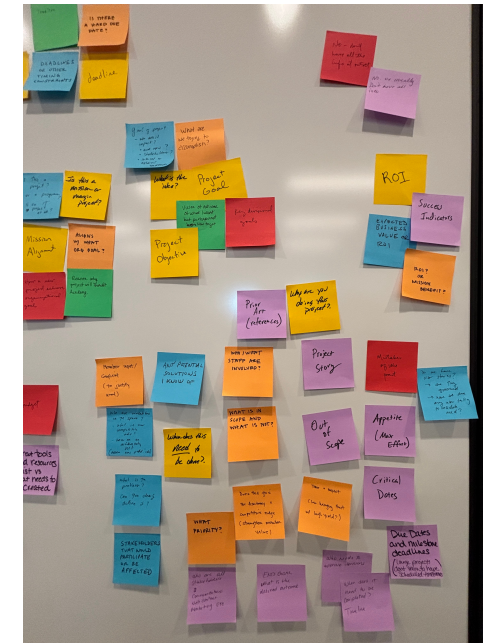
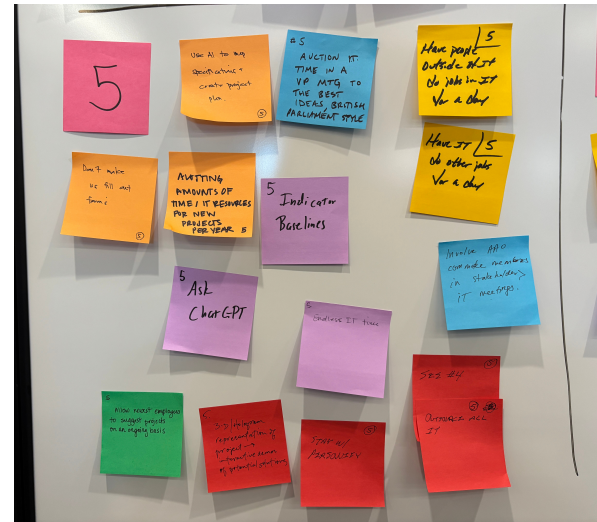
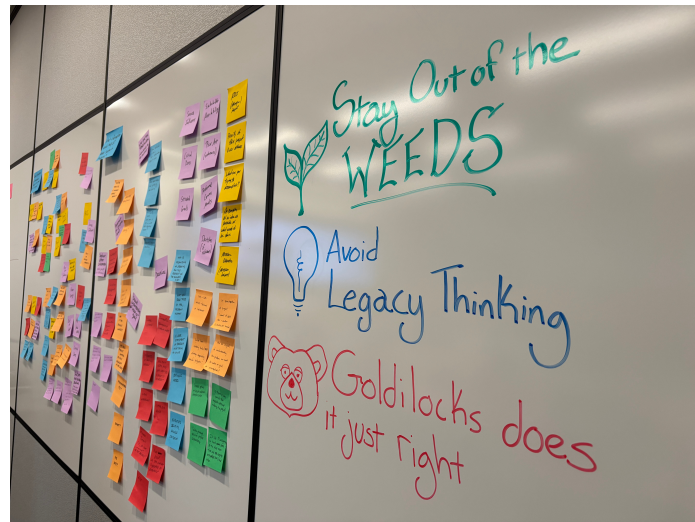
Appendix



Pictures

Appendix

Monday Workshop



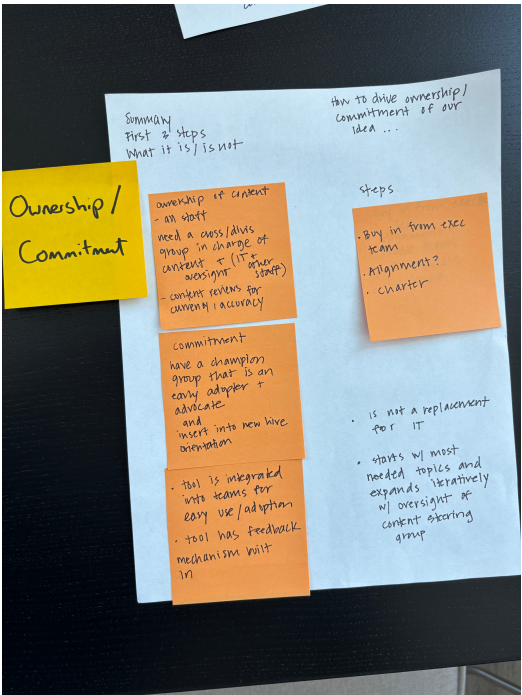
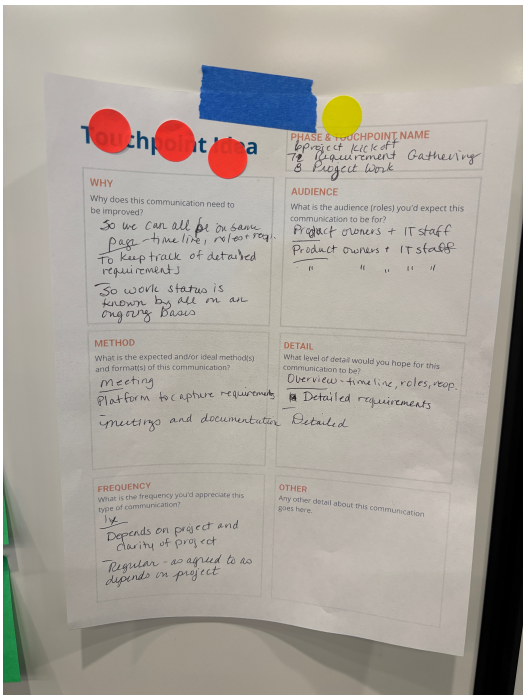
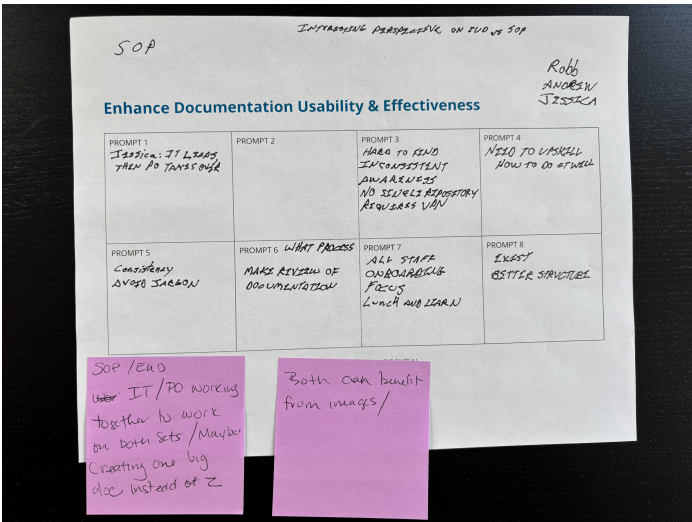
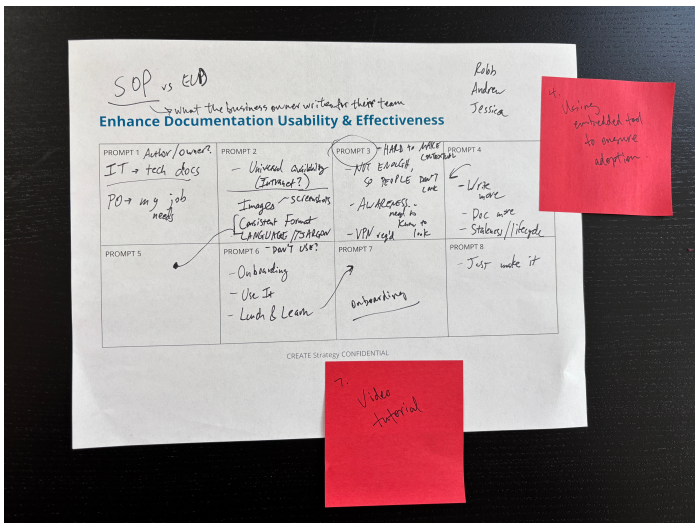
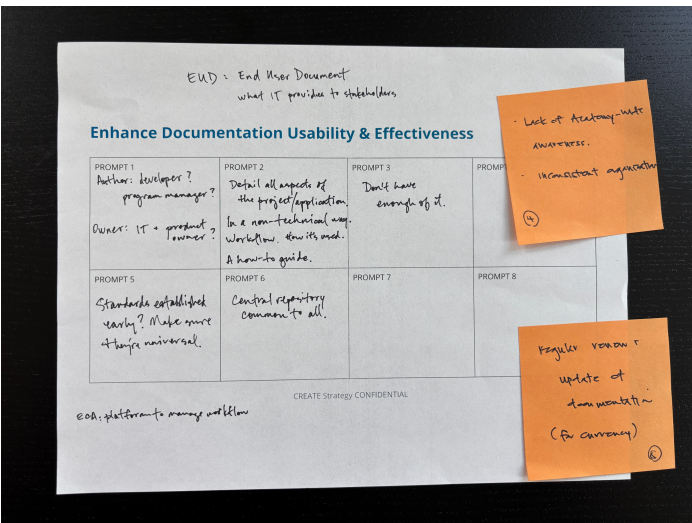
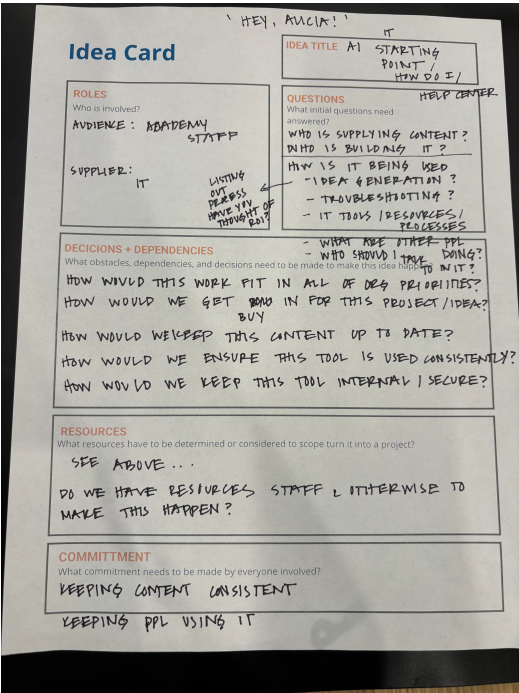
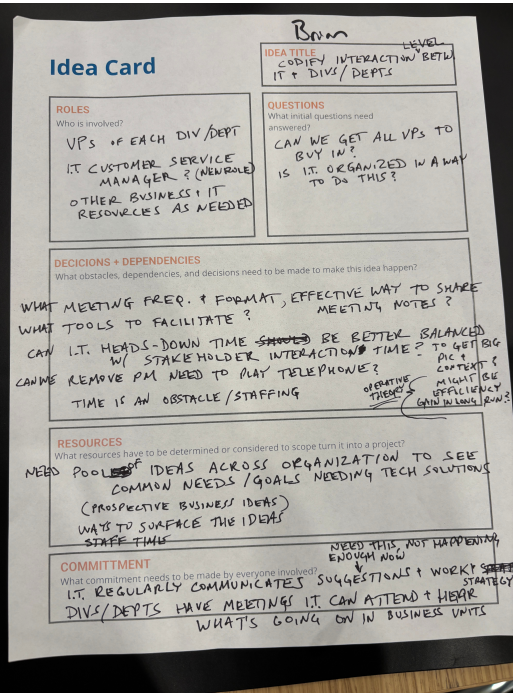
Pictures

Appendix



Pictures

Appendix



CREATE

STRATEGY

CREATE Progress Through Creative Visualization

CREATE offers unique workshop building consulting services focusing on organizational alignment and customer-centric solutions that remove barriers to progress. Whether you are an established business or a startup finding your footing, we collaborate and guide you toward your desired outcomes.

We are a women-owned business specializing in strategy, business, technology and design research fields, with a process driven by entrepreneurial values—risk-taking, passion, opportunity, innovation, and creativity.

Driven by entrepreneurial values, we foster reciprocal cultures within businesses and society.



Stephanie Krell
CREATE Strategic Co-founder

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