PROCESS ANALYST GUIDE

Teams benefit from regularly taking a step back from their daily work to analyse their processes. Use this guide at the end of a meeting where all members of the team are present. Consider the following questions and select the most relevant ones to discuss. This discussion may be led by the Process Analyst or any designated team member.

Topic	Questions to consider
General team process	• Did the team set an agenda and plan for the meeting? If not, who should take responsibility for this next time? • Did the team stick to the agenda or expand it as necessary? • How would a team member add an item to the agenda? • Did the team identify any barriers or challenges to the smooth functioning of the team, and how they can be addressed? • Were there any interactions of team members that disrupted the team processes?
Team roles	• Who took responsibility for ensuring a productive team meeting? • What strategies can the team implement to improve team process? • What team roles (Initiator, Timekeeper, etc.) were employed in the meeting? How did the roles impact the team process? • What team roles were missing? What impact did this absence have on the team process?
Team membership and attendance	• Do we consider ourselves to be a team? • Did all team members have an opportunity to contribute to the meeting? How did this affect team function and decision-making? • If some members are joining the meeting remotely (e.g. via phone or videoconference), were all members able to fully participate? • Who was missing from the meeting and why?
Team tasks	• At the end of the meeting, did all team members know what tasks they were responsible for? • Did the team set timelines for task completion? • Did the team follow up on tasks from previous meetings or activities?
Client centeredness	• How did the team demonstrate a patient-, family-, or client-centered approach? • What checks does the team have to ensure this approach?
Environment	• What impact did the physical environment have on the team process? • What changes to the physical environment (arrangement of chairs and tables, background noise, etc.) could improve team process? • How did the team's electronic environment, including communication tools and document sharing, impact team process?
Going forward	• What will the team do to improve its processes in the future? What changes are necessary for this to happen? • How will the team assess whether changes are effective?