SAMPLE AGENDA

Automation Opportunity Sprint

A short, structured sprint to find the two or three repetitive workflows in a clinic or department where automation with human review would help most, confirm what the systems can actually provide, and write a scoped pilot brief for each.

FORMAT	LENGTH	TRACK
Facilitated working sessions over one to two weeks	**Two half-day sessions, with short follow-ups between them**	**Automate**

This is a sample agenda. Every session is tailored to the client: modules, timings and exercises change with your organization, your systems and the people in the room.

Session goals

1. A measured shortlist of candidate workflows, ranked by staff time, error risk and how easy the output is to verify.
2. Confirmed facts about data access and system interfaces, not assumptions.
3. A one-page pilot brief for the top candidate, including the review step and the measures.

Who it is for

A practice manager or operations lead, one or two people from each affected role, and an IT or systems partner. Five to ten people.

Before the session

- Two weeks of simple time tracking on the most repetitive tasks, using a template we provide.
- Access to someone who knows what your main systems can export or expose.
- A decision maker who can approve a small pilot.

Schedule

TIME	MODULE
Session 1, 0:00 – 0:30	**What we measured** The time-tracking results, read together. Surprises are usually here.
Session 1, 0:30 – 1:45	**Workflow walk-throughs** Each candidate workflow is walked through step by step with the people who do it. Inputs, systems, judgments and hand-offs are marked.
Session 1, 1:45 – 2:00	*Break*
Session 1, 2:00 – 3:30	**Ranking and the systems check** Candidates are ranked. For each, the questions the systems partner must answer before session two are written down.
Between sessions	**Confirming the facts** Short follow-ups: what each system can export, who controls access, what security review would apply.
Session 2, 0:00 – 1:00	**What the systems can do** The answers, and how they change the ranking.
Session 2, 1:00 – 2:30	**Designing the review step** For the top candidate: what a person checks, how uncertain items are flagged, who decides, and how decisions are recorded.
Session 2, 2:30 – 3:30	**The pilot brief** Baseline, target, owner, timeline, review step and stop conditions, written together. Close.

Hands-on exercises

- Walking a workflow step by step on the wall with the people who do it.
- Ranking candidates on an effort, impact and verifiability grid.
- Designing the human review step for the top candidate using a synthetic example.

You leave with

- A ranked shortlist of automation candidates with the reasoning
- A record of what each system can and cannot provide today
- A one-page pilot brief for the top candidate
- A time-tracking template the team can reuse

Safe use

Sessions use synthetic or de-identified material only. Please do not bring patient information, real message threads or live system access into the room. Nothing in a session is clinical, legal or compliance advice, and no tool is endorsed or evaluated as safe for clinical use by taking part.