

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

**Facilitated working sessions
over one to two weeks**

LENGTH

**Two half-day sessions, with
short follow-ups between them**

TRACK

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	<i>Break</i>
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.