

crankfrog WORK GROUP LIFECYCLE METHODOLOGY

Would your organization benefit from a work group? As a quick test, try answering the following questions.

- Are you developing a product that requires input from multiple stakeholders?
- Do you need to bring varying, or even competing, stakeholders together to solve a shared challenge?
- Are you struggling to drive alignment towards a collective vision?
- Do you have a cross-departmental process that needs to be streamlined?



Our Approach

Organizations faced with these types of challenges may benefit from implementing collaborative work groups. Creating and leading productive work groups can be a challenge; however, following crankfrog's work group lifecycle (as shown below) an organization can develop an effective work group that results in impactful outcomes.

Figure 1: Work Group Lifecycle



Using this lifecycle as a framework, below are several tactics crankfrog recommends to help organizations foster successful work groups.



Stage 1: Formation

Establish a solid foundation to ensure the appropriate goals, expectations, and participants are identified.

- **Develop a group charter.** Charters are typically simple, one-page documents that outline objectives, agenda topics, attendees and the initial schedule of the work group. Group charters aid in creating a standard set of guidelines for participants to follow and define expectations. Charters are helpful to reference throughout a work group's life cycle to ensure the original objectives are being met.
- **Identify the right participants.** An individual's position in the organization, ability to commit time and resources, knowledge depth as it relates to the topic at-hand, and collaborative attitude are all key qualities for work group participants. Depending on the goals of the work group, participants may need detailed, in-depth knowledge of a subject; strategic thinking skills; or maintain enough leverage within an organization to implement the work group's solutions. Varying recruitment strategies may need to be deployed to ensure that individuals, who are critical to the success of the work group, agree to participate.
- **Prepare the content.** A crucial part of the formation stage includes creating the agenda and any applicable content needed for the work group meetings. Content development may require interviewing participants beforehand, scoping discussion topics, and performing research and analysis on issues prior to coming together.



Stage 2: Facilitation

Drive constructive conversation, brainstorm innovate solutions, and successfully navigate challenging topics.

- **Encourage active participation.** Successful strategies include distributing pre-surveys to participants and reviewing results during the meeting, breaking into small groups with report-outs upon reconvening, and coordinating interactive games to inject some fun into the meeting.
- **Brainstorm as a group.** Organizers should facilitate these brainstorming sessions to direct dialogue, help attendees find common themes, and identify gaps to success.
- **Organize social events.** Often overlooked, social events allow participants to network with each other, decompress from a day's discussion, and build momentum for the next discussion. Social events are critical in forming a cohesive and team-based work group.



Stage 3: Analysis

Determine follow-up needs, such as creating sub-groups, managing action items, and scheduling one-on-one follow up conversations.

- **Create sub-groups.** Sub-groups include more detailed discussions on a specific topic. Additional participants can be involved as applicable, or if designated by the main work

group participant. Sub-groups may meet for a finite period before reporting back to the larger work group on decisions or outcomes.

- **Track action items.** Work groups, and any affiliated sub-groups, can result in numerous action items. Solid project management tools are necessary to track these actions items to ensure their completion and that continued progress is made.
- **Follow up.** Individual follow-up meetings with participants are usually necessary following a larger work group meeting to discuss any feedback, concerns, and next steps. One-on-one meetings provide a venue to vet participant perspectives further and to discuss any challenges specific to that participant.

Stage 4: Monitoring

Implement on-going monitoring protocols to track progress and meeting outcomes.

- **Provide status updates.** Organizers should create and distribute status reports between work group meetings to monitor the progress of all follow-up items.
- **Plan for the future.** Identification and prioritization of future discussion topics is also an important task to maintain throughout the life cycle of a work group. Regular review of the meeting cadence is critical to ensure the organizers of the work group remain cognizant of participant time commitment and to ensure desired meeting outcomes are being achieved.

The Results

Collaborative work groups can result in innovative solutions to address common challenges and bring about organizational change. crankfrog has years of experience leading successful work groups and is ready to help you achieve your organizational goals.

For five years, crankfrog has convened and facilitated a work group for a national not-for-profit. With our help, the not-for-profit assembled subject matter experts from peer organizations to reduce common administrative costs through industry-level solutions and has developed and implemented several industry-wide solutions including:

- An industry leading national solution for collecting provider data to support provider credentialing;
- A multi-stakeholder solution for identifying overlapping medical coverage, supporting over 130 million members;
- A common Primary Source Verification solution to reduce credentialing inefficiencies.

Interested in learning more about how crankfrog led a work group that brought together competing organizations to create mutually-beneficial, industry-level change? Ready to partner with us? [Contact](#) us today.