



Discovery Workshop Overview

Part of the 4-step Discovery Process, the Discovery Workshop (Step 2) is a 2-4-hour interactive discussion led by U.S. CAD to understand existing processes, current solutions and workflows, pain points, and goals to identify areas of opportunities and provide recommendations for improvements. During the workshop, our experts will lead a discussion related to:

THE 2-4 HOUR WORKSHOP WILL GUIDE THE PARTICIPANTS THROUGH A DIALOGUE COVERING:



1. Initial Highlights From the Completed Discovery Workbook



2. Organizational Overview

Team Structure | Internal Department Interactions | Key Staff | Outside Consultant



3. Existing Workflow Process Mapping

Current State Operations | Solutions/Tools Used | Receivables and Deliverables



4. Desired Workflow Process Mapping

Current State Operations | Solutions/Tools Used



5. Solutions Utilized in Existing Workflows



6. Existing Pain Points and Obstacles



7. "Wish List" Items

Participants in the Discovery Workshop should include key stakeholders from your organization. These individuals will offer the insights needed for the U.S. CAD team to provide the best recommendations on potential solutions and workflows. On occasion, follow-up conversations are required to clarify further topics discussed during the workshop. U.S. CAD will reach out to the appropriate individuals following the workshop to have further discussion.

U.S. CAD utilizes whiteboards, sticky notes, and other tools when performing the workshop to capture notes and ideas. Participants are encouraged to actively participate throughout the entire workshop, adding notes on the whiteboard, jotting down thoughts on a sticky note, and placing them on the board. When conducted virtually, Discovery Workshops are delivered through Zoom and utilize a virtual whiteboard environment that all participants easily access.

The information gathered from the Discovery Workbook (Step 1) and Discovery Workshop (Step 2) is then used to prepare and present Findings and Recommendations (Step 3) in a separate meeting.