### **Lessons Learned**

**Project:** Rooming Workflow Optimization for Medical Assistants  
**Location:** Optum Primary Care  
**Project Lead:** Nathan Rudamas  
**Completion Date:** October 20th 2023

#### **1. What Went Well**

* **Cross-Team Collaboration:** Communication between MAs and providers was overall positive. Many stakeholders were eager to provide input and help test workflow improvements.
* **Workflow Standardization:** The implementation of a clear, step-by-step rooming process led to measurable improvements in rooming time and reduced confusion across teams.
* **Training Manual Effectiveness:** The training manual was well-received by new hires and ensured consistent onboarding and process understanding.
* **Leadership Support:** Support from Manager Jamie Grell and clinical leads helped move the project forward and provided credibility to the implementation.

#### **2. Challenges Encountered**

* **Delayed Provider Feedback:** Several key providers delayed in responding to workflow proposals, extending the project timeline by 2–3 weeks.
* **Staffing Shortages:** Short-staff periods limited the ability to pilot changes and gather feedback in real-time, requiring flexibility in scheduling.
* **Change Resistance:** A few MAs were initially hesitant about adopting a standardized workflow, especially those accustomed to their own rooming styles.

#### **3. Mitigation Strategies**

* **Weekly Check-Ins:** Implemented short, informal meetings to maintain momentum and accountability among stakeholders.
* **Incremental Rollout:** Piloting the workflow with a small MA group (Tatiana, Kim, Scott, Liz) before full implementation helped gain buy-in and refine the approach.
* **Feedback Loop:** Used surveys and verbal feedback sessions to quickly identify issues and adapt the workflow accordingly.

#### **4. Recommendations for Future Projects**

* Set stricter feedback deadlines with built-in reminders for stakeholders
* Consider cross-coverage planning when key roles are impacted by staffing shortages
* Integrate more visual elements (flowcharts, checklists) in training materials to accommodate different learning styles
* Schedule debriefs midway through implementation, not just at project close