**Clinical Reminder Dialog Template Planning Meeting Template**

**Who is the requestor?**

A good introduction is a first step toward a productive working relationship. Here is your chance to build a little rapport. Introduce yourself. Model the introduction you would like to receive from the requestor. Provide a little background about yourself. Tell them why you are excited to be a part of this project. Then listen to their story.

Click or tap here to enter text.

**Why is this clinical reminder dialog template (CRDT) needed?**

Find out what problem the CRDT aims to solve. Is there a patient safety issue or is it mainly process improvement?

Click or tap here to enter text.

**What are the business goals?**

How will the CRDT create value for the VA, for the clinicians, and for the Veterans they serve?

Click or tap here to enter text.

**How will the team know the project is a success?**

A favorable impact is expected — how will this be measured?

Click or tap here to enter text.

**Who will be negatively impacted by the implementation of this CRDTr?**

Someone will feel challenged or burdened. What can be done to reduce this impact?

Click or tap here to enter text.

**What are the data needs?**

What types of data will the staff intend to pull? What do they want the health factors to be? What questions tend to arise when the project is under way? Take a moment to set the stage for reaching out later when questions come up.

Click or tap here to enter text.

**What is the timeline?**

By when must the project be completed? Are there any milestones or deadlines of which you should be aware?

Click or tap here to enter text.

**Who are the intended users?\***

What are their training backgrounds? Are they all from the same discipline?

Click or tap here to enter text.

**What is the context of use?\***

What is the service department? What is the use environment (e.g., in clinic or in Veteran’s home)?

Click or tap here to enter text.

**Are there any end users or subject matter experts that can support your effort?**

It would be ideal if you could conduct an interview with an end user that is not involved with the commissioning of this product (see **User Interview Guide**). This person may also assist you later when you have a design ready for testing.

Click or tap here to enter text.

\* If the requestor is an end user, a more in-depth treatment of this line of questioning would be encouraged. Consider completing the companion document **User Interview Guide.**