

VSys Voices

Standardizing across the Enterprise:
A Systems-Based Approach

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VSys Voices Panelists

Karina Vargas

Solutions Architect at VSys

- Started at VSys in 2021
- Over 20 years as a volunteer manager (10 in healthcare)

Manda Merrill

Project Manager at VSys

- Started at VSys in 2019
- CAPM Certified

They have both assisted multiple VSys clients in process improvement efforts and standardization within large healthcare systems nation wide.

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Target Audience for Today's Webinar

SKILL LEVEL



Minimal Knowledge

Looking for some basic information, key principles and "how-to's" on the subject.



Working Knowledge

Integrated practices and moving beyond basic concepts. Looking for breadth and depth on a topic



Authoritative Knowledge

Looking for advanced knowledge, integration and concepts that are innovative and cutting edge.



Learning Objectives



The Standardization Ecosystem: Key Contributors & Their Roles



The Standardization Playbook: Moving from Chaos to Clarity



Striking the Balance: When to Standardize and When to Customize



The Standardization Ecosystem: Key Contributors & Their Roles



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Key Contributors and Their Roles

- **Stakeholders/End-users:** usually not involved in meetings but should be considered when considering changes and their potential impact; might be consulted separately to gather their perspective.
- **Project team members:** the selected members that represent the stakeholders and end-users; they execute tasks, provide feedback on effectiveness and assist with implementation of new processes
- **Project manager/Team lead:** an individual who coordinates meetings, establishes agenda and keeps team focused on tasks; may act as liaison between team members and subject-matter experts and/or leadership
- **Subject-matter experts:** usually not involved in meetings but are consulted when process changes need validation (i.e. human resources, legal, marketing, information technology, etc.)
- **Sponsor/Leadership:** individual(s) who expect the team to complete the tasks of standardizing; may contribute “final decision” or “tie-breaker” when team is a stand-still; receives updates from Project manager/Team lead on standardization process



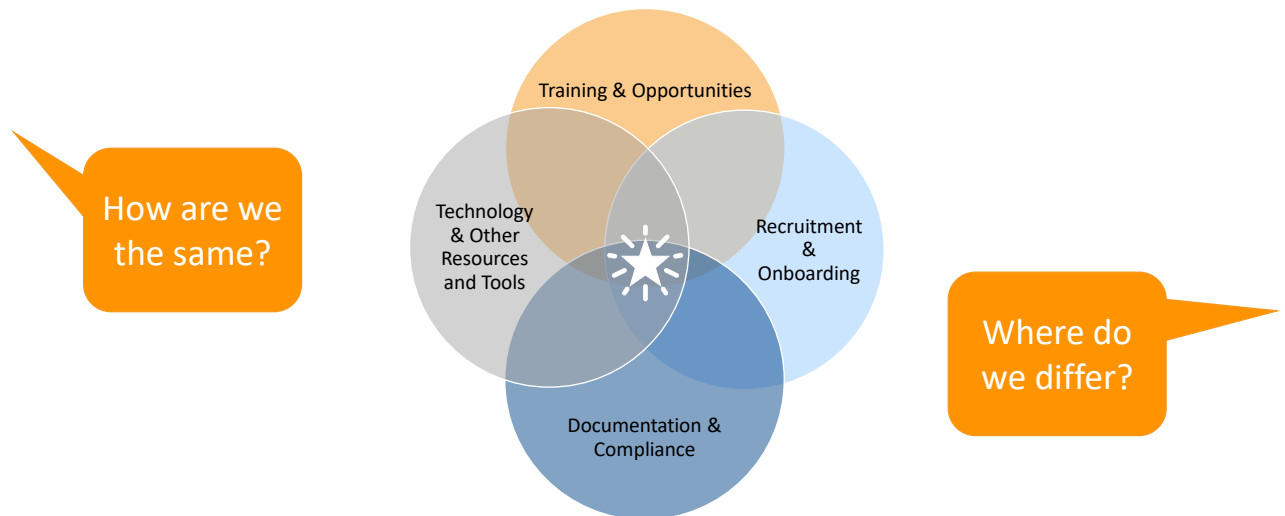
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The Standardization Playbook: Moving from Chaos to Clarity



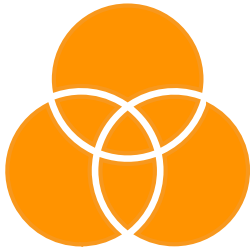
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Moving from Chaos...



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...To Clarity



Resolve Differences in Processes

- Keep open and constant communication
- Seek to compromise and merge, not have one process “win” over another
- It’s just business, no personal feelings need to be involved
- Project manager/team lead is essential in helping to resolve differences
- Document the agreed-up process



Maintaining Clarity

- Annual Reviews/check ins with one another
- Making necessary updates where/when needed
- Working with HR/Legal to be sure you’re using the most up to date verbiage/documentation



Striking the Balance: When to Standardize and When to Customize



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When to Standardize: Advantages that Out-weigh Efforts



Can this knowledge be shared at the organizational level? Allow for cross-training?



Build trust and community across the volunteer management teams?



Will it help cut down on the confusion and reduce “unknowns”?



Does it build a best-practice program that ensures a consistent volunteer experience?



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When to Customize: Challenges You May Encounter



Challenge: Facing a team conflict or not coming to a consensus

- Why? Differences in generational viewpoints, work experience and technology
- Resolution? Bring in leadership/subject-matter experts to guide the team and **keep the goal of standardization**

Challenge: Varying compliance and regulatory standards across programs/states

- Why? Depending on the tasks performed or location, or even regulatory bodies
- Resolution? After confirming compliance details, **customize processes only where necessary and if possible, aim to merge wherever possible**



Summary and Success Stories



Summary: When Organizations Standardize



- Same page, same book, less conflict
- Less guess work for what others are doing
- More resources in one another across the organization
- Ease of volunteer transfer across sites
 - Assurance in knowing they won't have to repeat requirements when moving across sites/managers



Examples of a few Success Stories

We assisted these organizations in standardizing:

- Documentation
- Onboarding processes
- Certifications
- Naming conventions
- Applications
- Job titles and descriptions
- Trainings, and so much more

This helped them succeed in working together.

Healthcare system
with 14 sites across
the state of Texas.

Larger healthcare
system with 22
sites across 3 states

Non-profit
organization with
over 20 locations

Healthcare system
with 10 sites in
Michigan



Questions/Discussion



Thank You For Joining Us

