

Diving into the 'Understand' Step – Scottish Approach to Change Webinar

18 August 2026

Welcome

Dayna Askew, Senior Programme Manager, Healthcare Improvement Scotland

Welcome

What do you hope to get out of today's session?

(please use the chat box to share your response)

Why are we here?

A learning webinar:

- Opportunity to build knowledge and skills to use the Scottish Approach to Change to deliver effective change



What are we covering today?

- 10:00 Welcome
- 10:05 What is the 'Understand' step of change
- 10:10 Engagement – building understanding with people
- 10:30 Understanding if your service works for people
- 10:50 Understanding your processes
- 11:10 Understanding your system
- 11:30 Bringing it all together
- 11:55 Wrap up
- 12:00 Close

Housekeeping



SUPPORT

- Tech not working? Tell us and we will help (his.satc@nhs.scot)



EXCHANGE AND RESPECT

- Share and contribute respectfully



RECORDING

- Recording: the session will be recorded
- Your cameras and mics will be switched off



PRESENCE AND FOCUS

- Focus: minimise distractions – avoid multitasking



QUESTIONS

- Please use the Q&A function in MS Teams



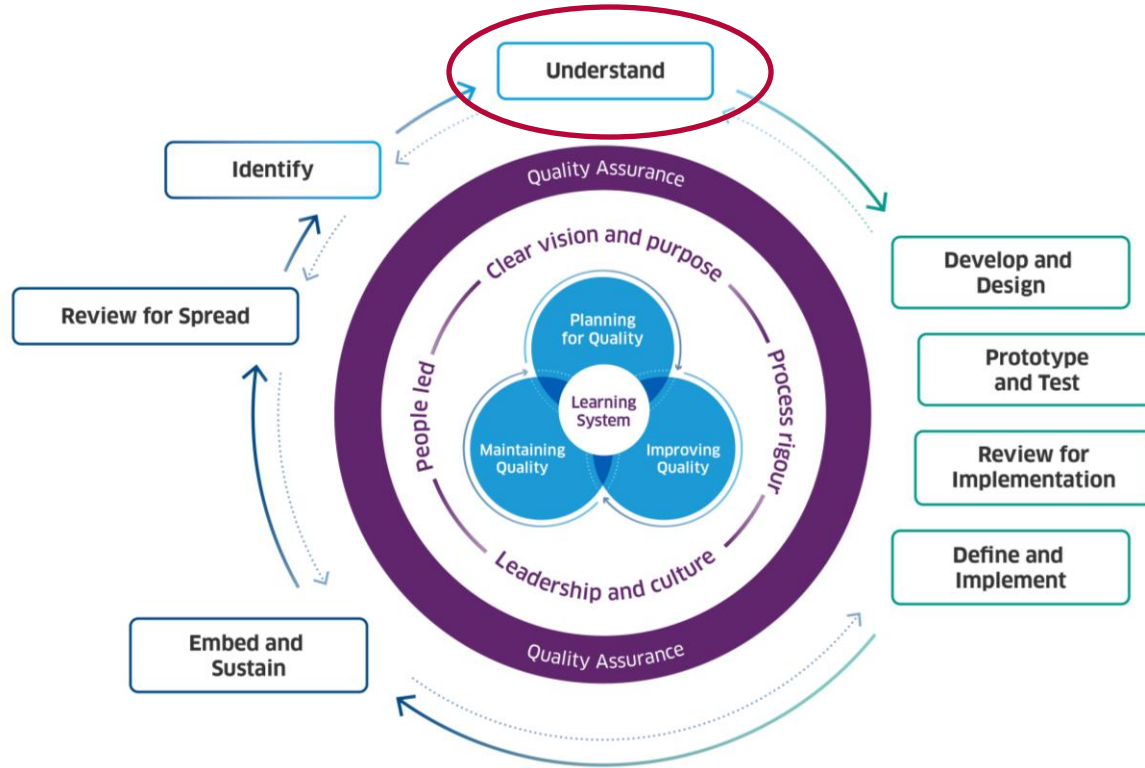
EVENT MATERIALS

- We will share materials after the event and let you know when they are ready

What is the 'Understand' step of change

Dayna Askew, Senior Programme Manager, Healthcare Improvement Scotland

The 'Understand' step of change



The Understand step reminds us to:

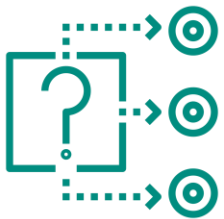
- Slow down
- Explore the challenge or issue
- Make sure we are solving the right problem

Why understanding matters

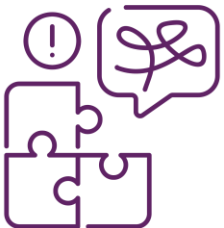
Without understanding



Solve the wrong problem



Focus on symptoms, not causes



Create new problems elsewhere

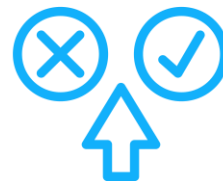
With understanding



Understand the need for change
(opportunities, barriers, enablers)



Understand the wider context and
system



Choose the right solution and
approach

Using multiple sources of insight



DATA



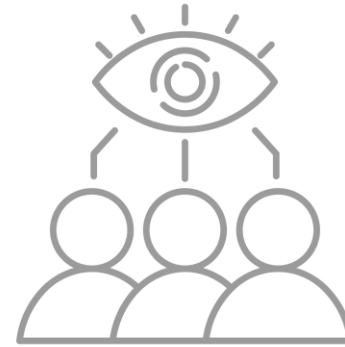
EVIDENCE



POLICY



ENGAGEMENT



**OPERATIONAL
INSIGHTS**

Data tells us what is happening. People help us understand why.

Understanding your readiness for change

Use the enablers for change to help assess your readiness for change



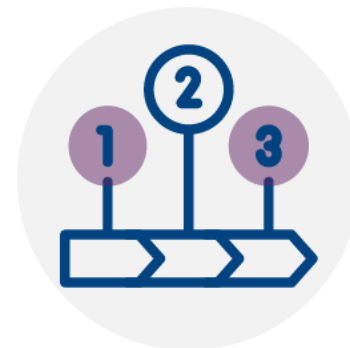
**Vision and
purpose**



**Leadership
and culture**



People-led



**Process
rigour**



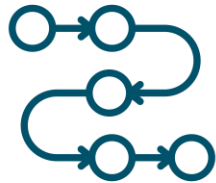
**Learning
system**

Understanding the type and scale change

Type of change



Process
improvement



Pathway
redesign



Multi-agency



Whole-system
transformation

Scale of change



Key takeaway

Understand before you act

The quality of your solution depends
on the quality of your understanding!

Engagement – building understanding with people

Kate Pettit, Senior Engagement Advisor, Healthcare Improvement Scotland

What is the Ladder of Participation?

The quality of our understanding is directly related to who we involve in creating it.

It supports us reflect on three important questions:

1. Who needs to be part of creating our understanding?
2. Who has influence?
3. Who should have influence for this work to be genuinely people-led?

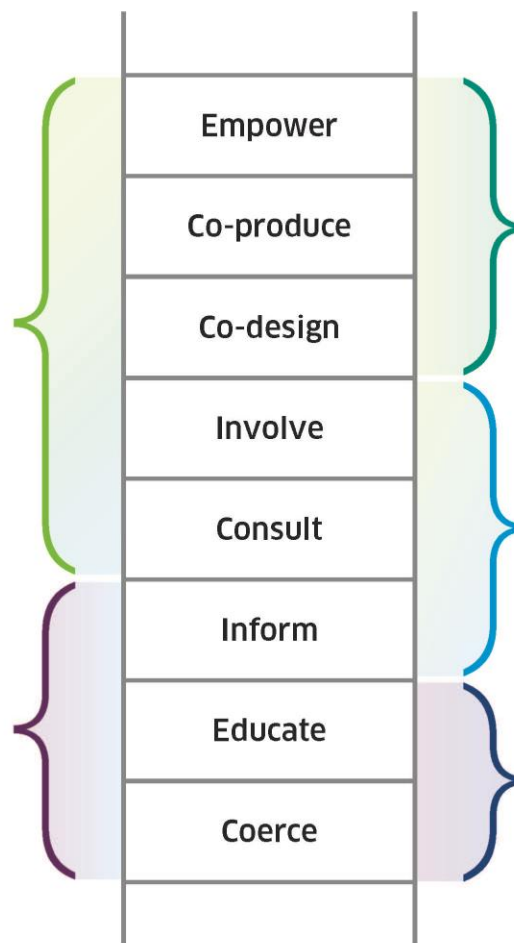
Ladder of participation (adapted)

Active Engagement

People and communities have more voice, influence and power in decisions as engagement increases towards empowerment.

Non-participatory Engagement

People and communities are informed or directed, with no scope to influence decisions or outcomes. Engagement is organisation-led and largely one-way.



Doing with

A partnership that increasingly shares power and decision-making with people and communities.

Doing for

People and communities are actively involved, but decisions are not shared and power stays with the organisation.

Doing to

No seeking input or involvement in decisions. No transfer of power.

Why use the Ladder of Participation

Every change project starts with a version of the truth.

The Ladder of Participation helps us test whether that version of the truth is:

- Broad enough
- Shared enough
- Shaped by the people who need to help create it

The right level of influence, at the right time, helps us build the whole picture.

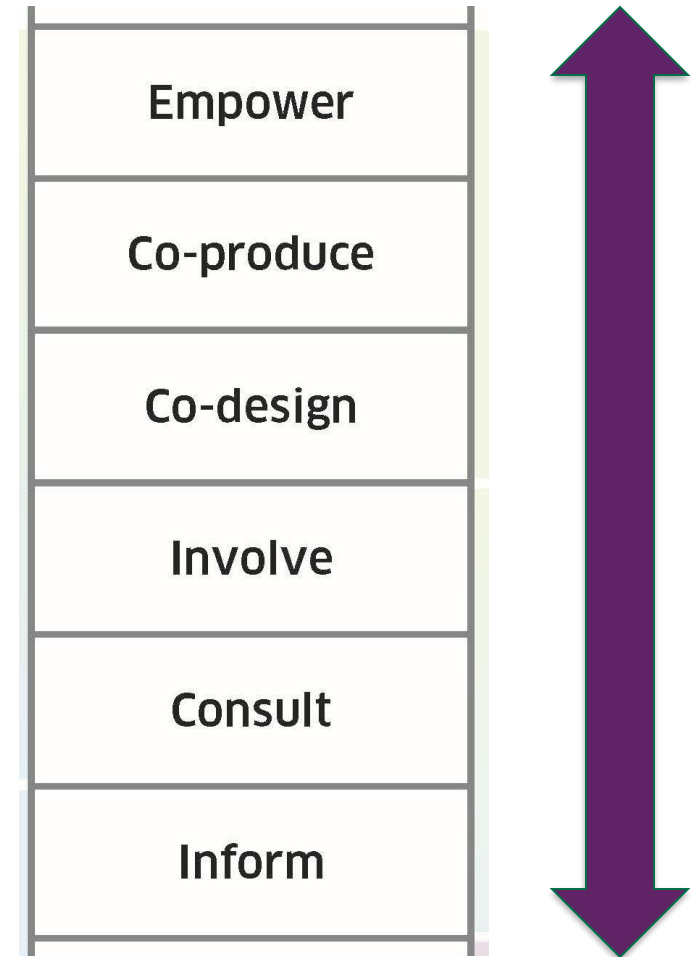
How apply the Ladder of Participation strategically

Use the whole Ladder

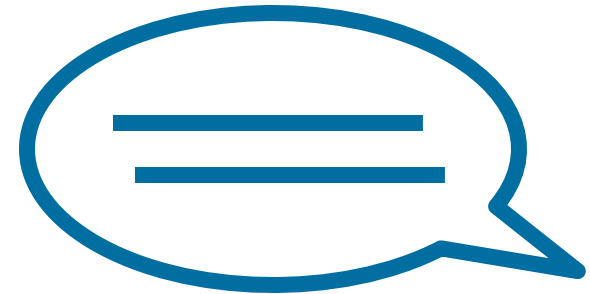
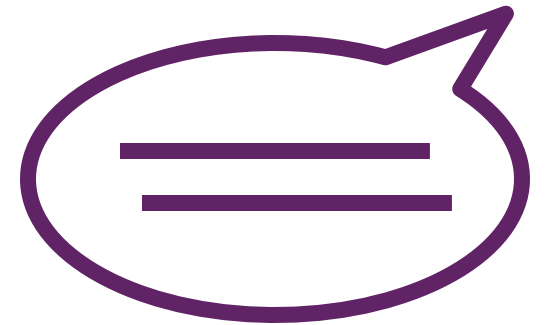
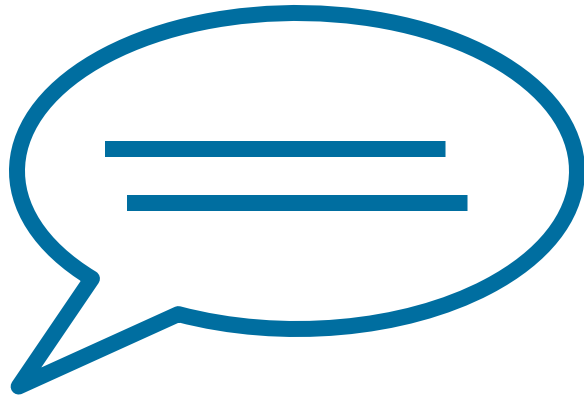
- Understanding is not created through one type of involvement

The Ladder is not a hierarchy of value

- The goal is not simply to reach the top
- Different people need different levels of involvement at different times.
- The right level depends on what we are trying to understand, who is affected, and what people can genuinely influence.



Q&A



Understanding if your service works for people

Chamithri Greru, Service Design Advisor, Healthcare Improvement Scotland

What is a journey map?

- It maps a person's journey step by step, capturing actions, thoughts, and emotions to help analyse the service
- Helps to understand the person's perspective and identify areas for improvement

Passage of time/ stages of the journey

Draw steps

Actions

Emotions

What's working/ not working

Learning/outcomes

As-is user journey

A user journey focusses on a service from a person's perspective, recording both good and bad experiences.

The user of the service is "HANS"

HOW DOES A USER BECOME AWARE OF THE SERVICE?

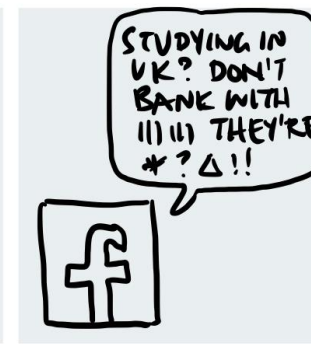
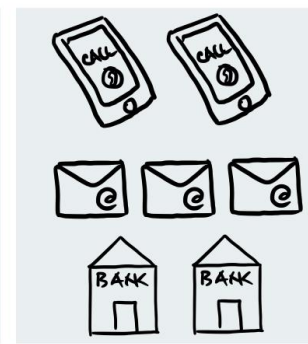
HOW DOES A USER JOIN THE SERVICE?

HOW DOES A USER EXPERIENCE THE SERVICE?

HOW DOES THE SERVICE DEVELOP FOR THE USER?

HOW DOES A USER LEAVE THE SERVICE?

Draw what this person does



Describe what is happening

ARRIVING FROM INDIA TO STUDY, NEEDS A BANK ACCOUNT.

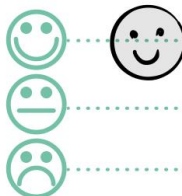
GOES INTO BRANCH ON THE HIGH ST + IS TOLD TO FILL IN ONLINE, PRINT + BRING IN

USES FRIEND'S COMPUTER - PRINTS OFF + TAKES TO BRANCH

3 WEEKS + MULTIPLE INTERACTION - STILL NO PROGRESS

GIVES UP + GOES TO ANOTHER BANK. SHARES BAD EXPERIENCE WITH 4000 FB FRIENDS ACROSS THE WORLD

Show how the person feels



What are the painful points in the journey?

CAN'T DO IT THERE + THEN

SLOW, OLD FASHIONED, RELY ON OTHERS

LACK OF COMMUNICATION

LOSS OF POTENTIAL CUSTOMERS REPUTATION LOSS

What opportunities are there to improve the journey?

DELIVER ON PROMISE

MAKE IT ONE CHANNEL EXPERIENCE

COULD DO BEFORE LEAVING INDIA?

KEEP UPDATED "YOUR APPLICATION IS"

UNDERSTAND WHAT CUSTOMER IS TRYING TO DO + MAKE IT EASY



Scottish Government
Riaghaltas na h-Alba
gov.scot



Office of the
Chief Designer
Digital Scotland

Why journey maps?

- Capture and understand people's experiences – beyond stories to provide insights for improving services or designing new services
- They don't assume one person's experience is the same as everyone else's, but they do show how processes work for an individual
- Looking at the person's journey helps us connect the different parts of the system
- Helps to build a clearer, fuller picture and this makes it easier to design services that are truly person-centred

What can journey maps help us understand?

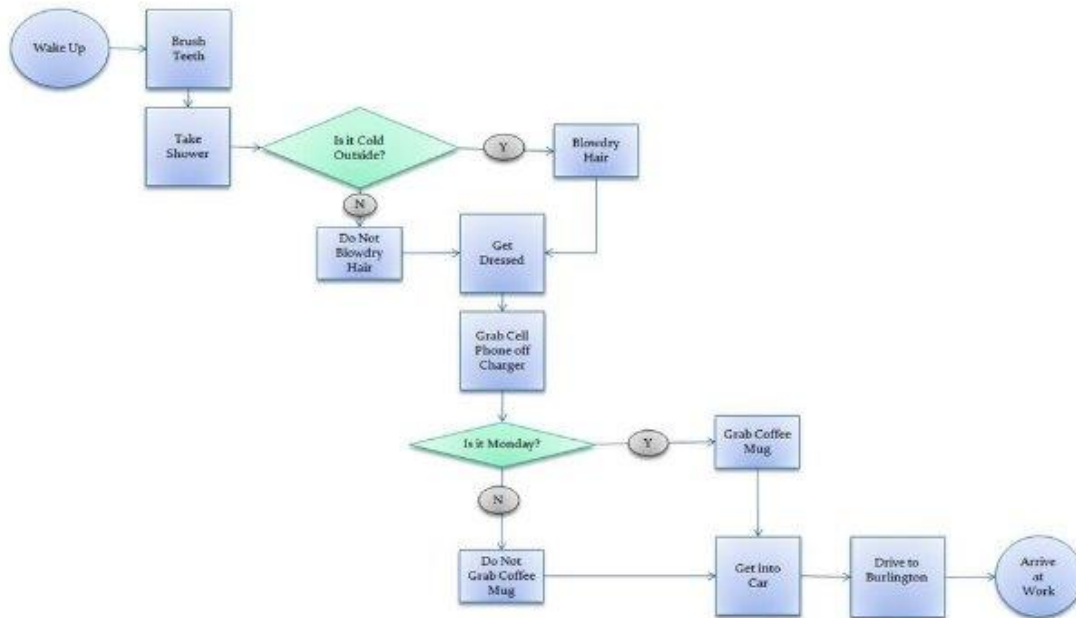
- How the current journey works, including pain points, gaps and opportunities for improvement
- What future services could look like and opportunities to shape strategy, training and stakeholder engagement
- Quantitative data alone does not always give the full picture –journey maps add a qualitative layer of evidence
- When the problem is complex, visualisation can help make sense

Remember....

A journey map isn't the end goal; it's the starting point for having the right conversations

How journey maps are different from process maps?

Detailed Process Map: Getting to Work



Nocito, S. & Zeribi, K. (n.d.) Building a Swim Lane Flow Chart. Tutorial for ImproveCareNow. (n.p.)

Image Courtesy: NHS Lothian

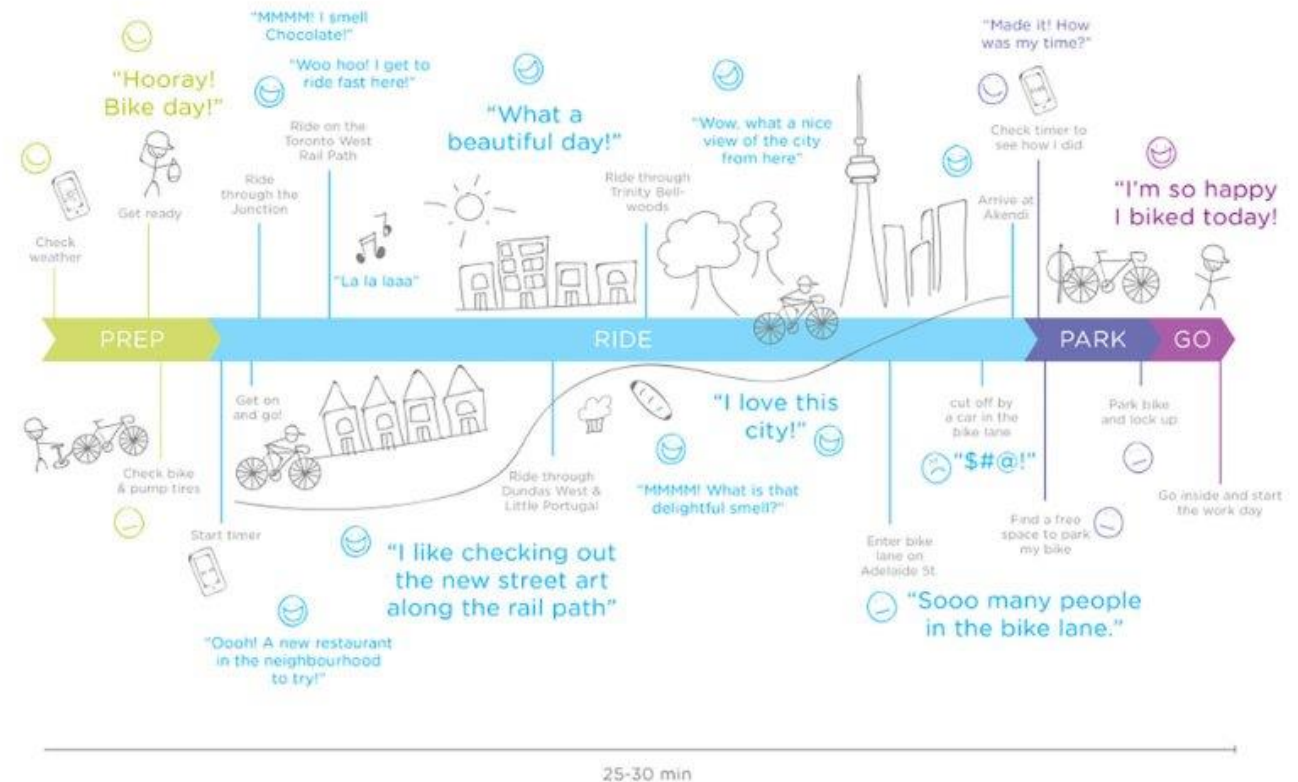


Image Courtesy: Amanda Billark

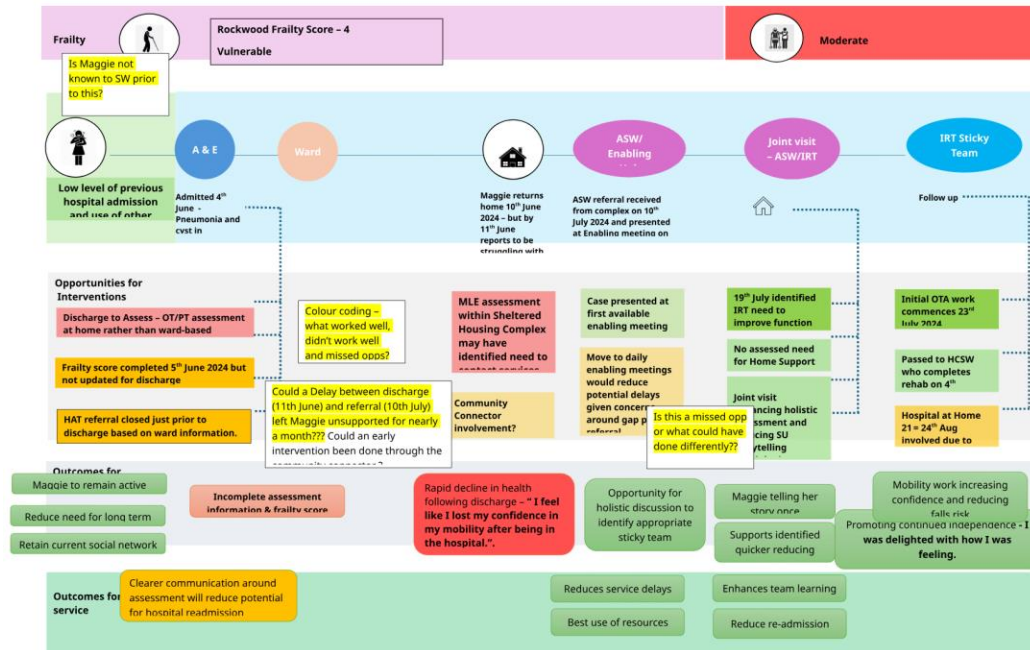
Process maps vs. journey maps

Process Maps	Journey Maps
Visually outlines steps and tasks involved in completing a process (typically from the org's perspective)	Highlights the stages and steps of a journey from the perspective of the person experiencing it.
Focuses on operational flow and task efficiency highlighting internal workflows, decision points and dependencies	Highlights experience, emotions, touchpoints and pain points as a person interacts with a service.
Helps understand the current system by identifying bottlenecks, and optimising processes by breaking down a complex system into individual steps (i.e. what the system delivers)	A tool to understand a person's individual experiences during interaction with a system as it allows for zooming in and out (i.e. a person's experience of that system)
Generates change ideas and measurement plans	Aims at designing a person-centred service. Cannot generalise but great for designing specific interventions, improving services and impactful storytelling
Gives consistency to follow the process	Builds empathy and deep understanding with the people of the lived and living experiences

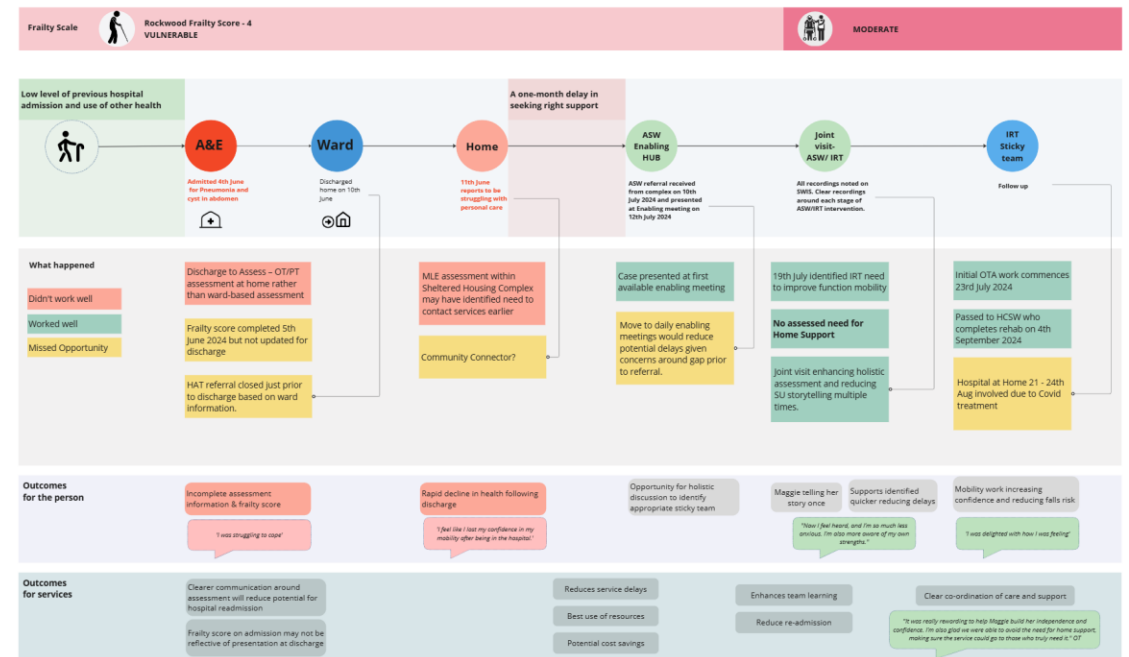
I am not a designer, can I still do a journey map?



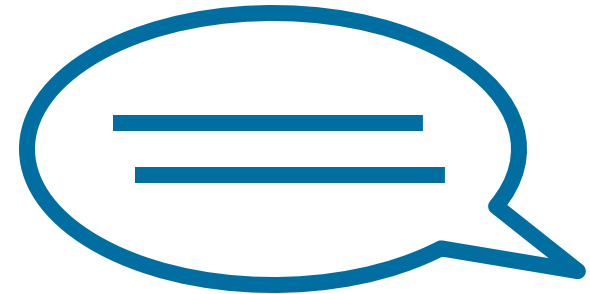
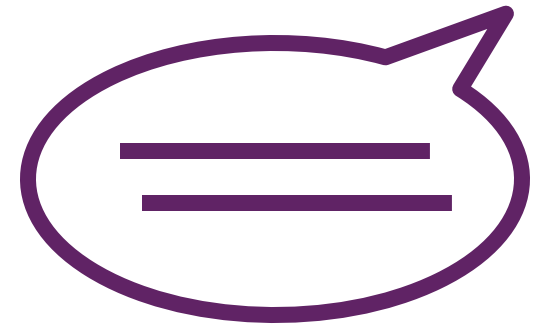
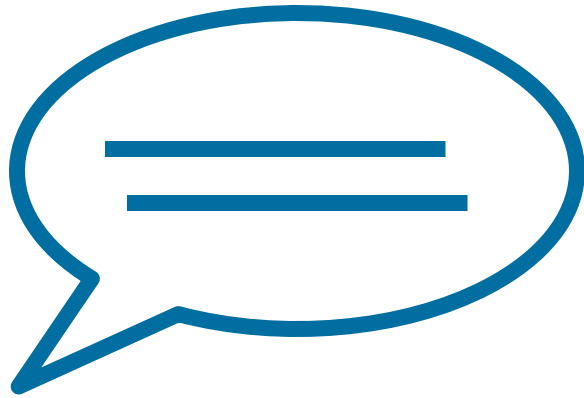
Maggie, 86, lives in a retirement housing complex, has multiple medical conditions including diverticulitis, visual impairment and has recent respiratory issues which resulted in her admission to hospital with pneumonia. Fiercely independent Maggie.



Maggie, 86, lives in a retirement housing complex, has multiple medical conditions including diverticulitis, visual impairment and has recent respiratory issues which resulted in her admission to hospital with pneumonia. Fiercely independent Maggie wishes to have as minimum a level of support as possible. From lacking confidence and feeling the need to be 'built up' the IRT intervention supported Maggie's baseline mobility and she was able to dance at a party within the complex.



Q&A



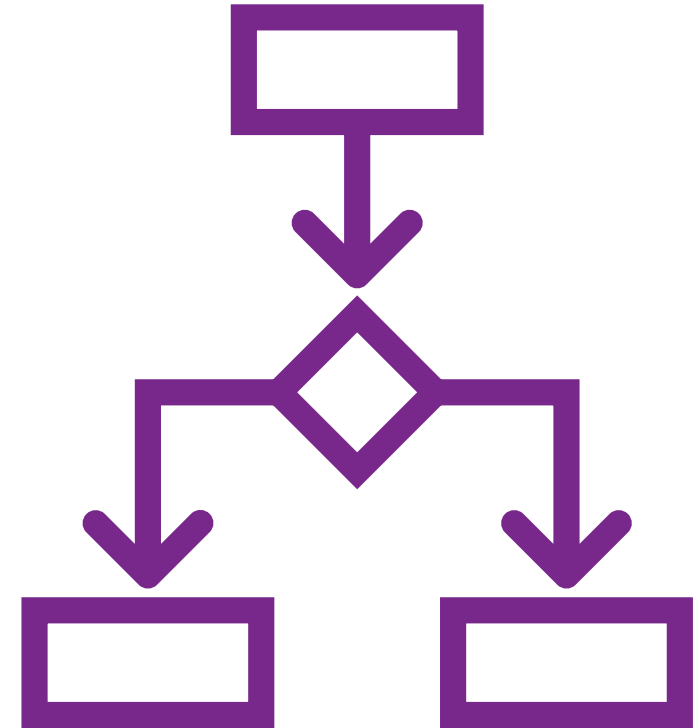
Understanding your processes

Ashleigh Hendry, Improvement Advisor, Healthcare Improvement Scotland

What is a process map?

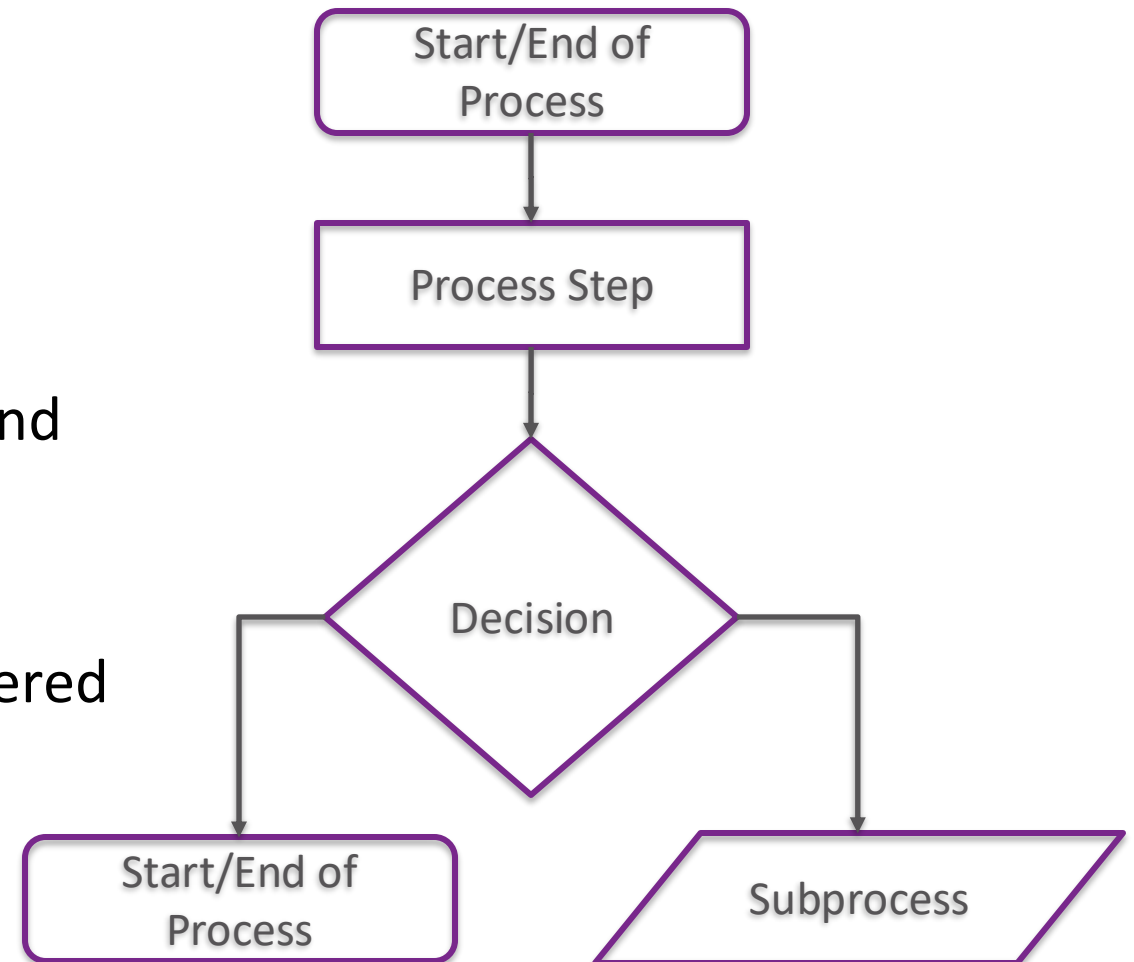
A visual way of showing...

- Where a process starts and ends
- The sequence of steps in between the start and end of the process
- Yes/no decision point in a process
- Arrows that connect the steps and decision points in a process and show the sequence they happen in



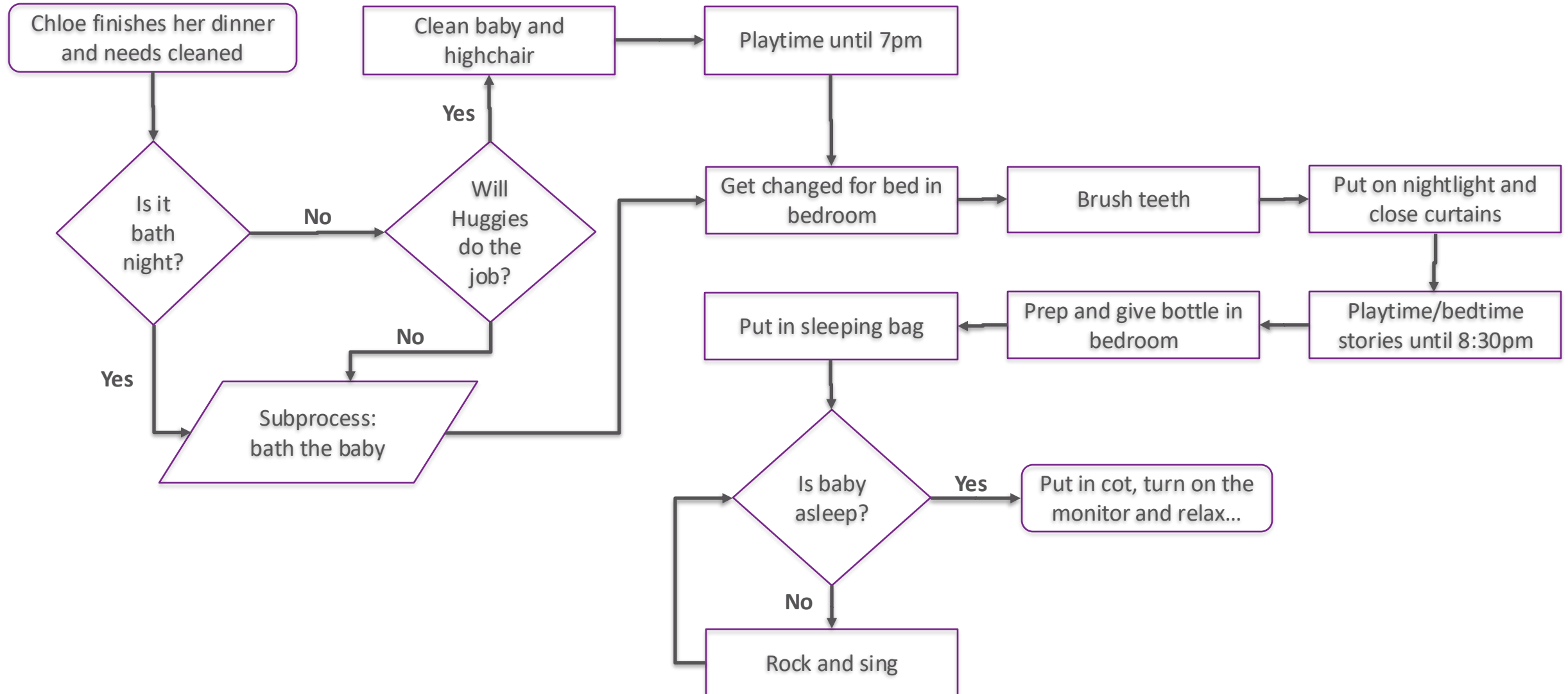
How to build a process map

- Come together as a team
- Agree the start and end point of the process
- List each step, marking any decision points and what they trigger
- Note any subprocesses which might be triggered
- Map it using process symbols



How to build a process map

Chloe's Bedtime Routine

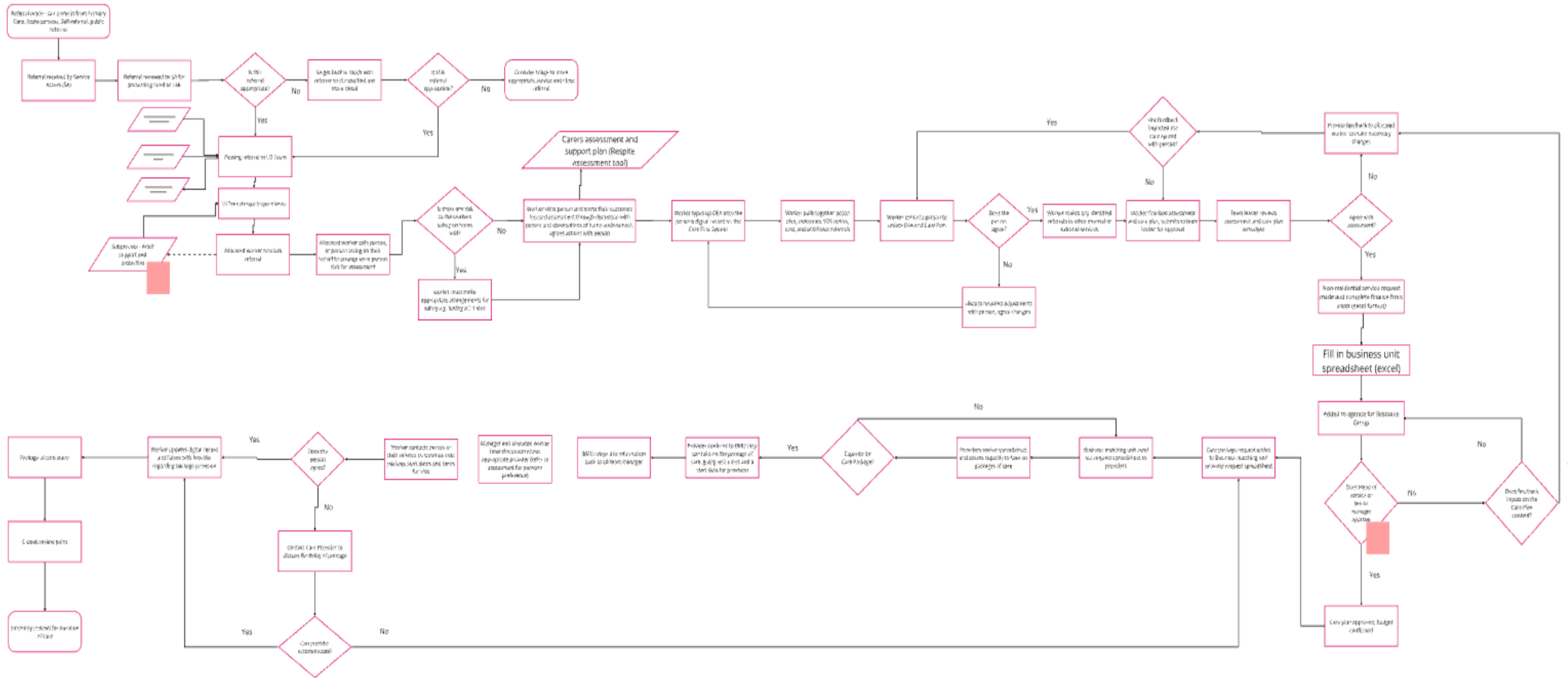


Improving processes

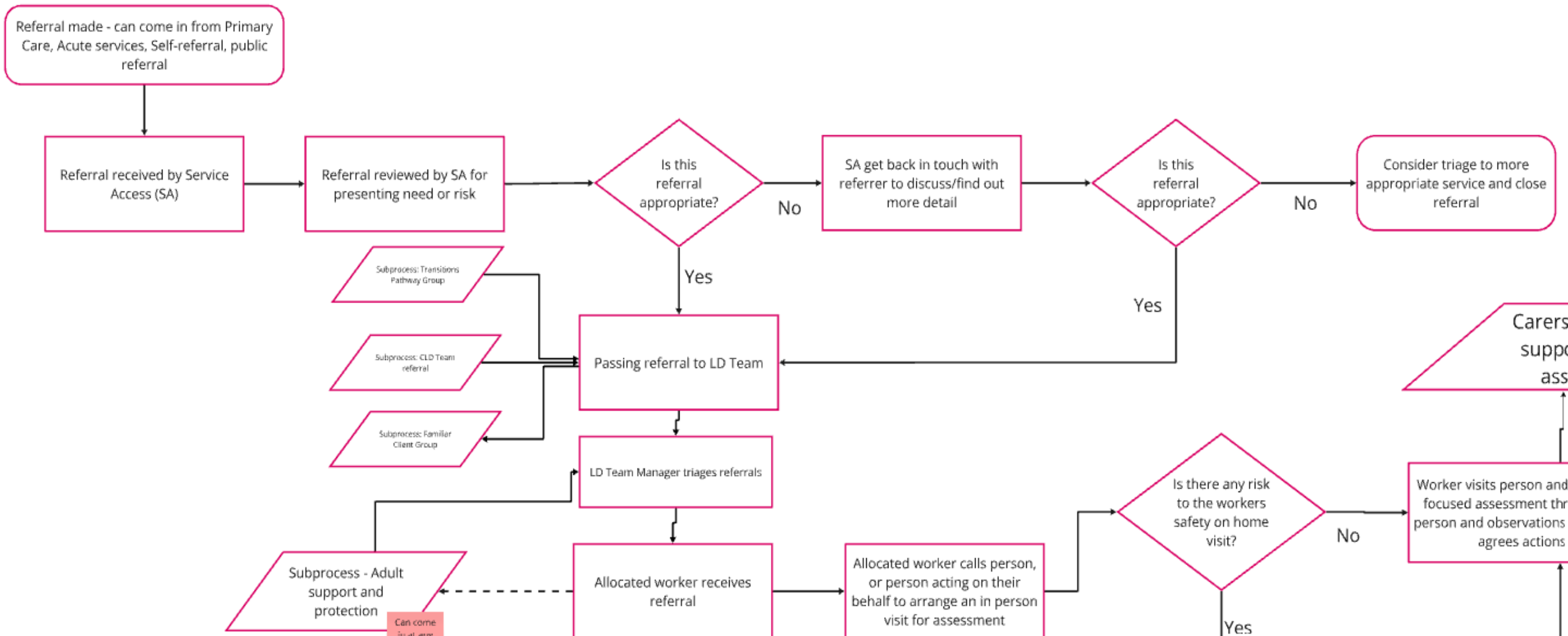


Social Work Care Management Process

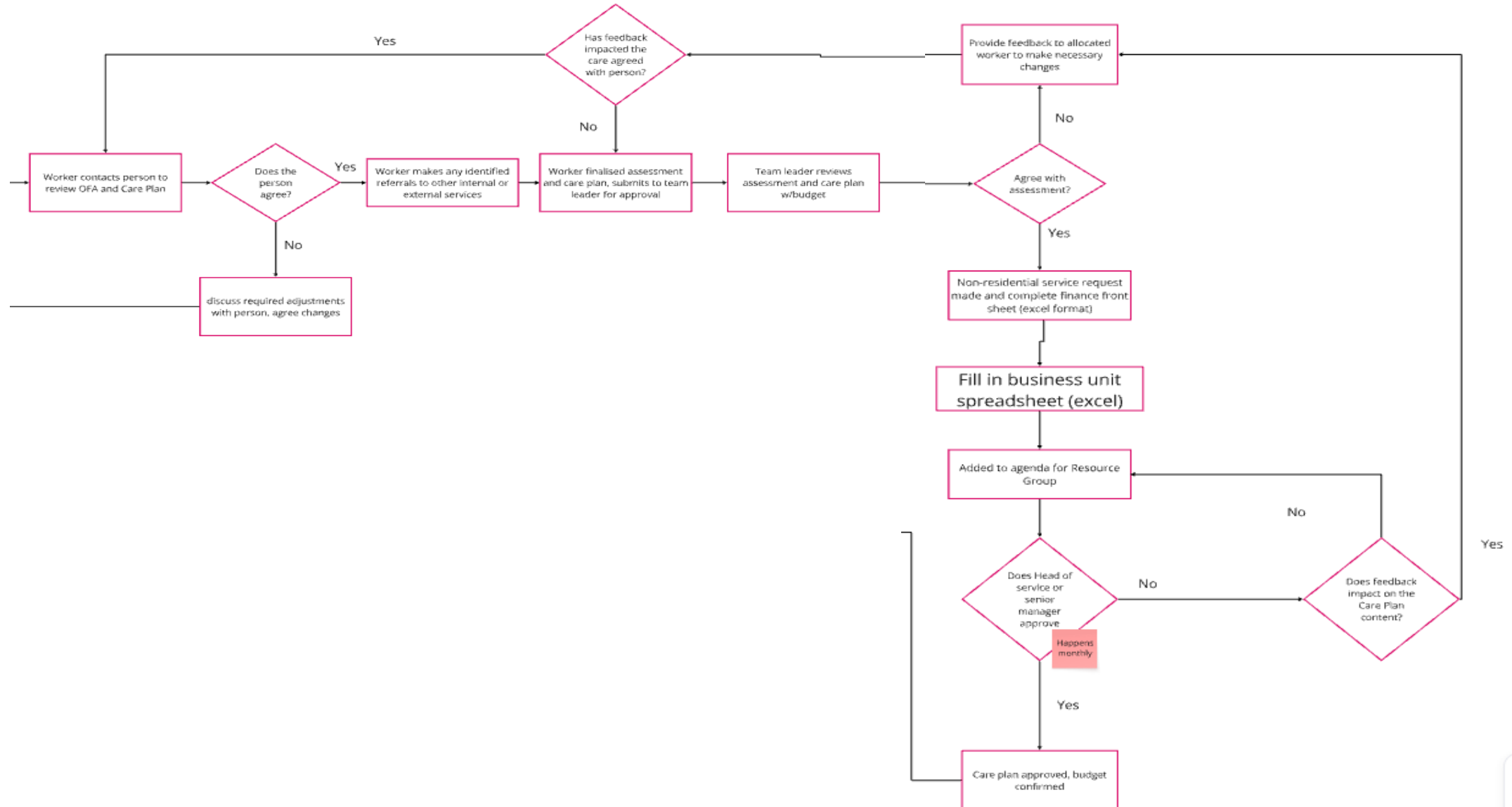
Care Management Process



Bottlenecks

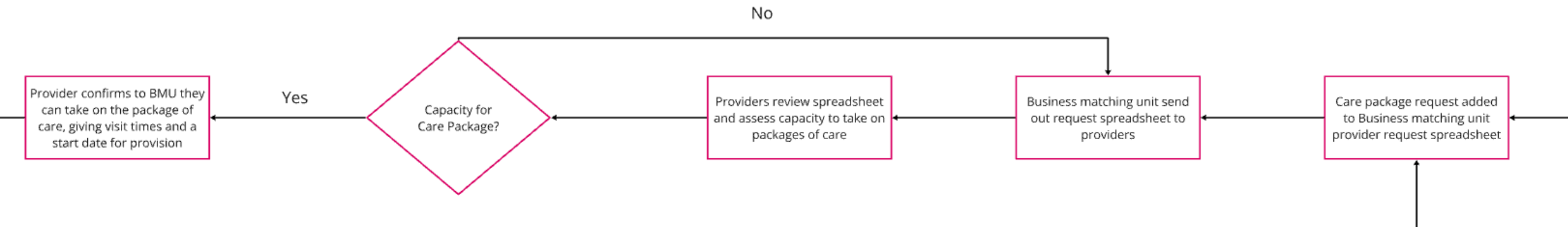


Duplication



Understanding experiences

*"I don't think I'm ever getting home.
I feel like I've been put me here to get me
out the way"*



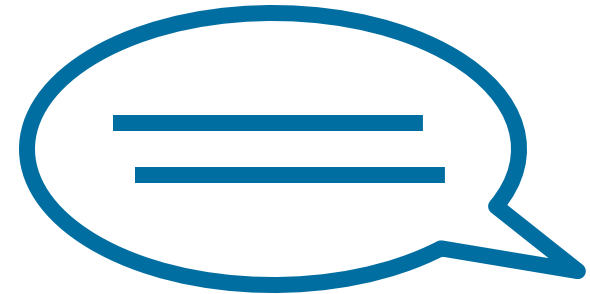
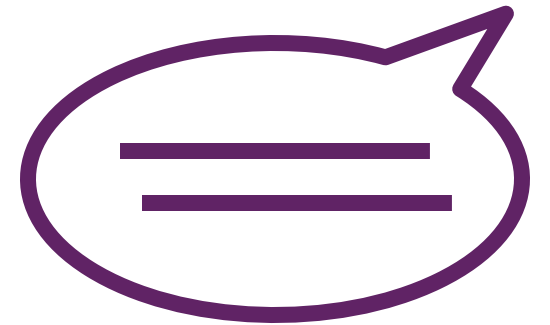
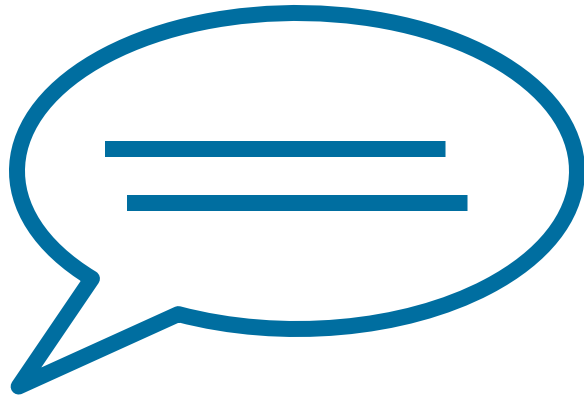
*"Thank you for telling me what's
happening, I feel so much better now I
know I'm not just being left here forever"*

Why use a process map?

- To shows everyone in a team how a process works in practice now, rather than what they *think* is happening
- To help identify bottle necks, duplication and steps that do not add value
- To highlight environmental, financial and social resources and impact
- To help identify change ideas for improvement
- To visually represent a new process



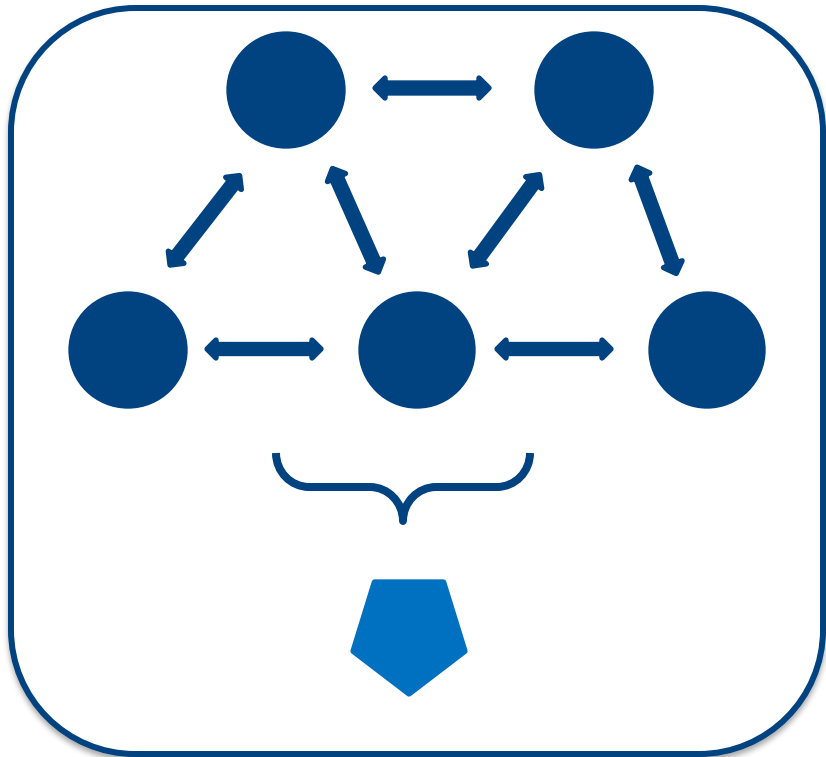
Q&A



Understanding your system

Gregory Hill-O'Connor, Senior Strategic Planning Advisor, Healthcare Improvement Scotland

What is a system map?



System mapping is rooted in ‘systems thinking’.

It seeks to describing a system – with a focus on understanding:

Its component parts

The relationships between them

The emergent properties

Mapping a system

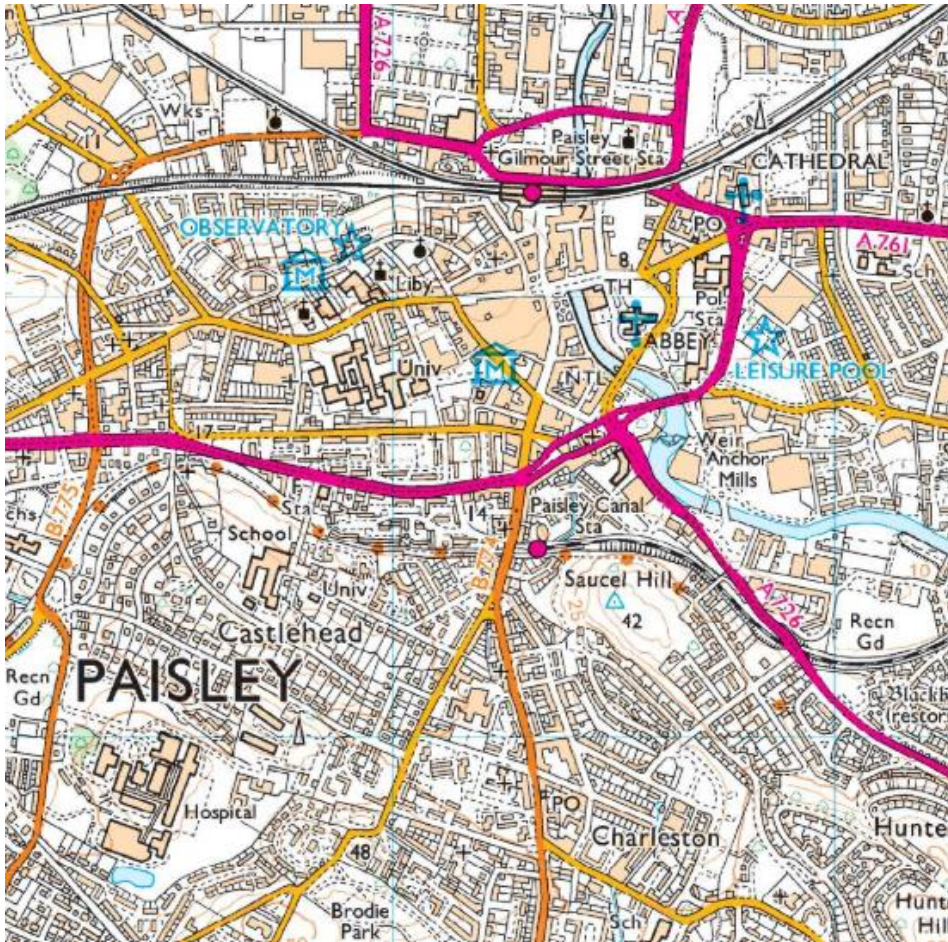
What would you like to know?



- How to navigate the underground system
- How much a journey might cost
- How accessible the journey is
- If you have to go 'south of the river'

Mapping a system

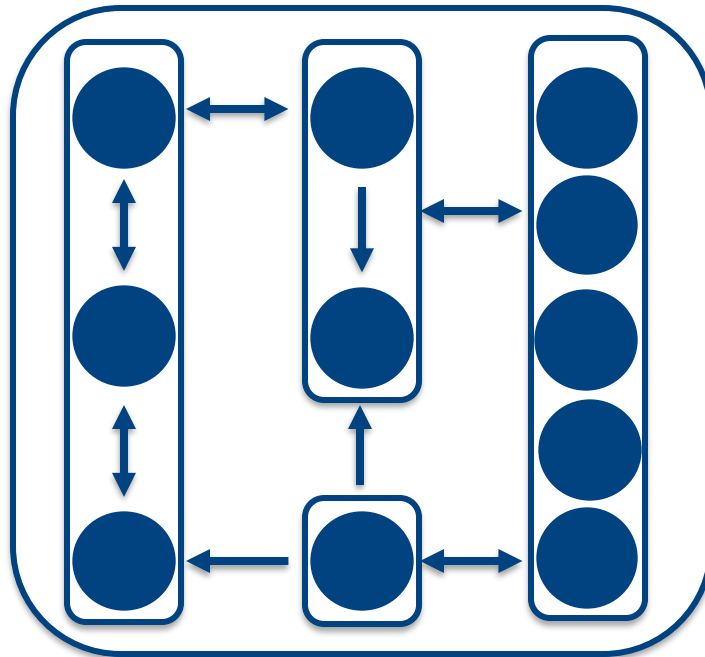
What would you like to know?



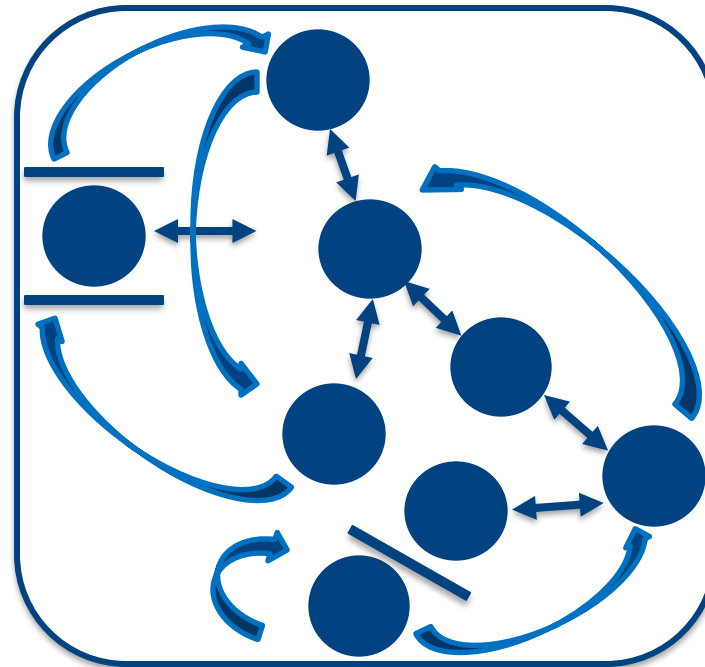
- How steep a hill is
- The size of houses
- Key landmarks
- Main roads

Why use a system map?

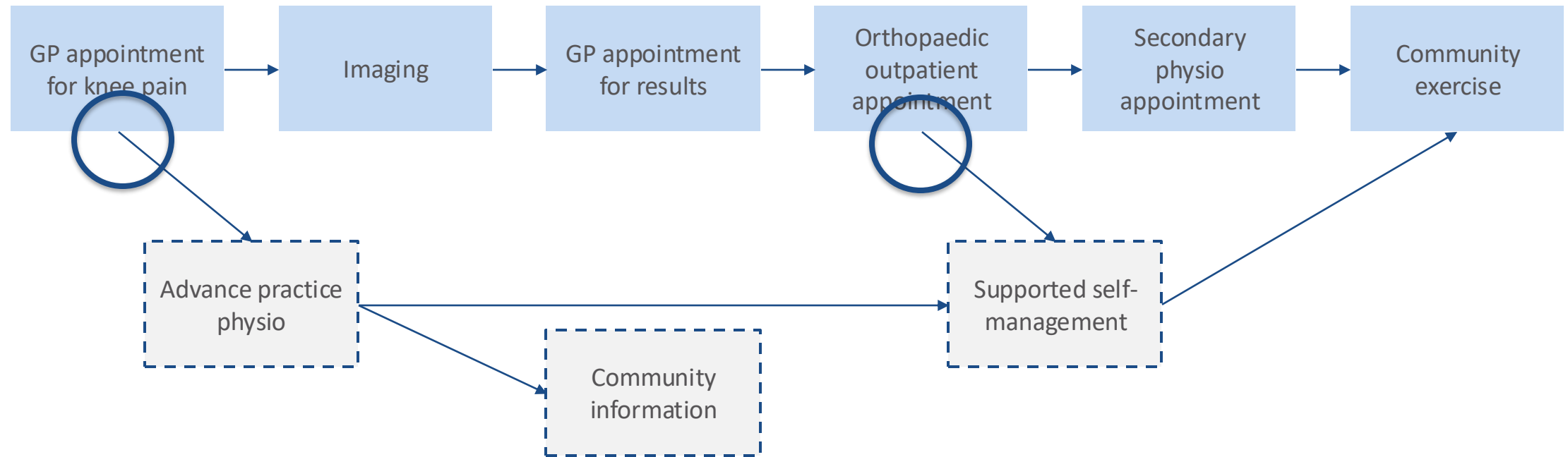
THE STRUCTURE OF A SYSTEM



THE BEHAVIOUR OF A SYSTEM



Why use a system map?



Clustering



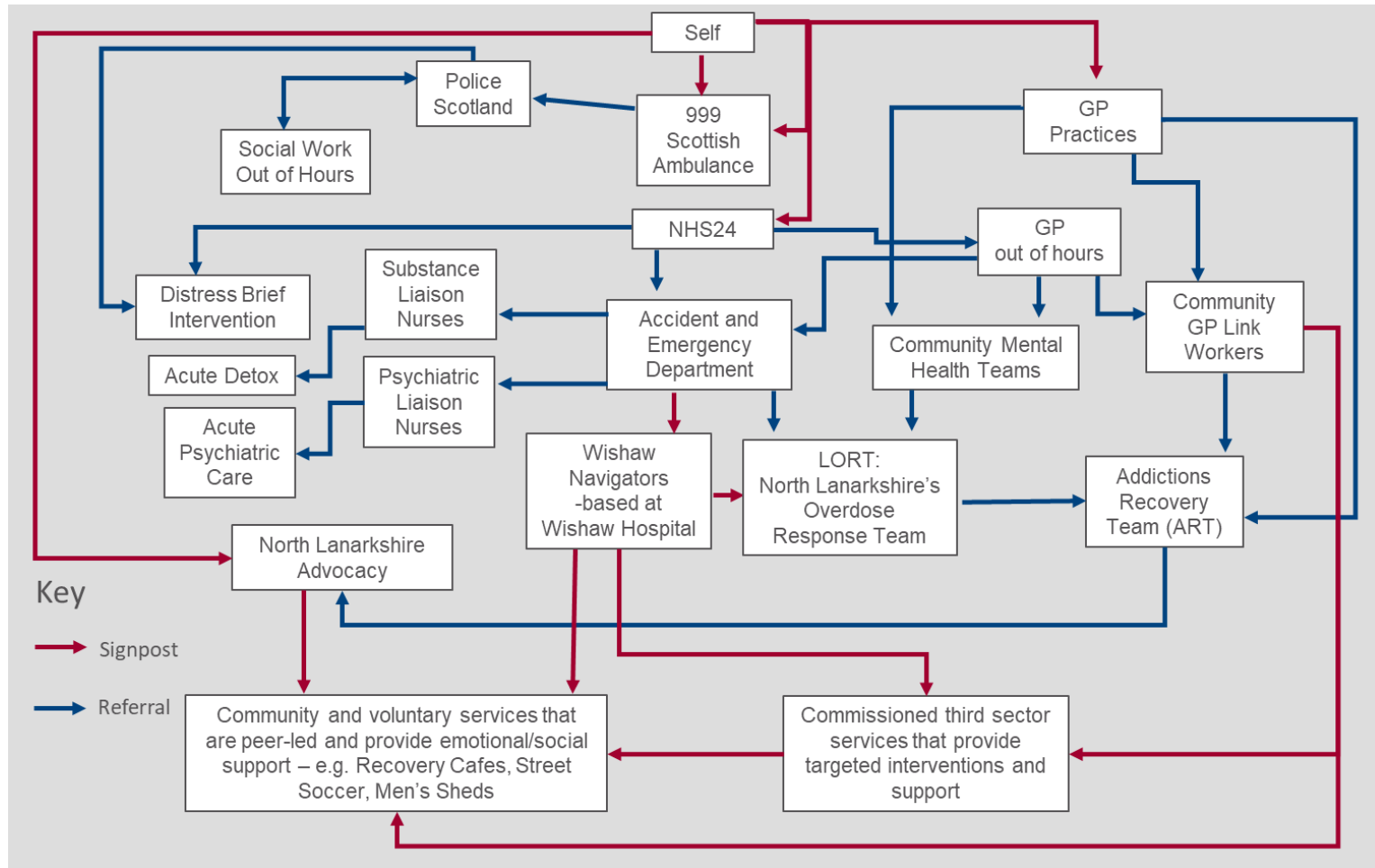
Group similar services based on their function and purpose. For example:

a) Group services that are offered at different levels such as primary care, secondary care and third sector providers.

b) Identify key stakeholders operating within these service clusters and their roles within the system: Make sure to Identify any missing stakeholders and service providers.

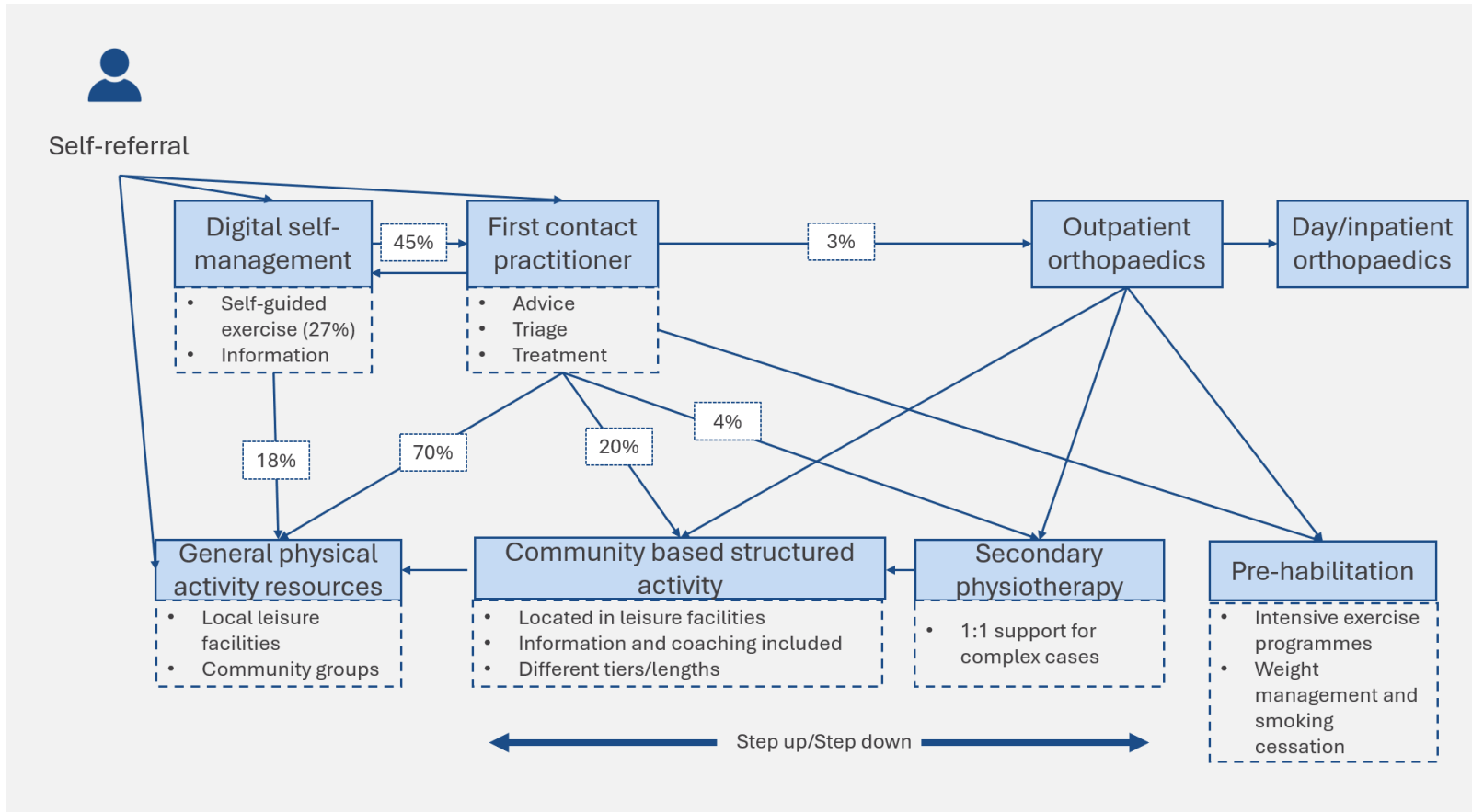
Clustering service parts and components can act as fundamental building blocks of the system.

Building connections



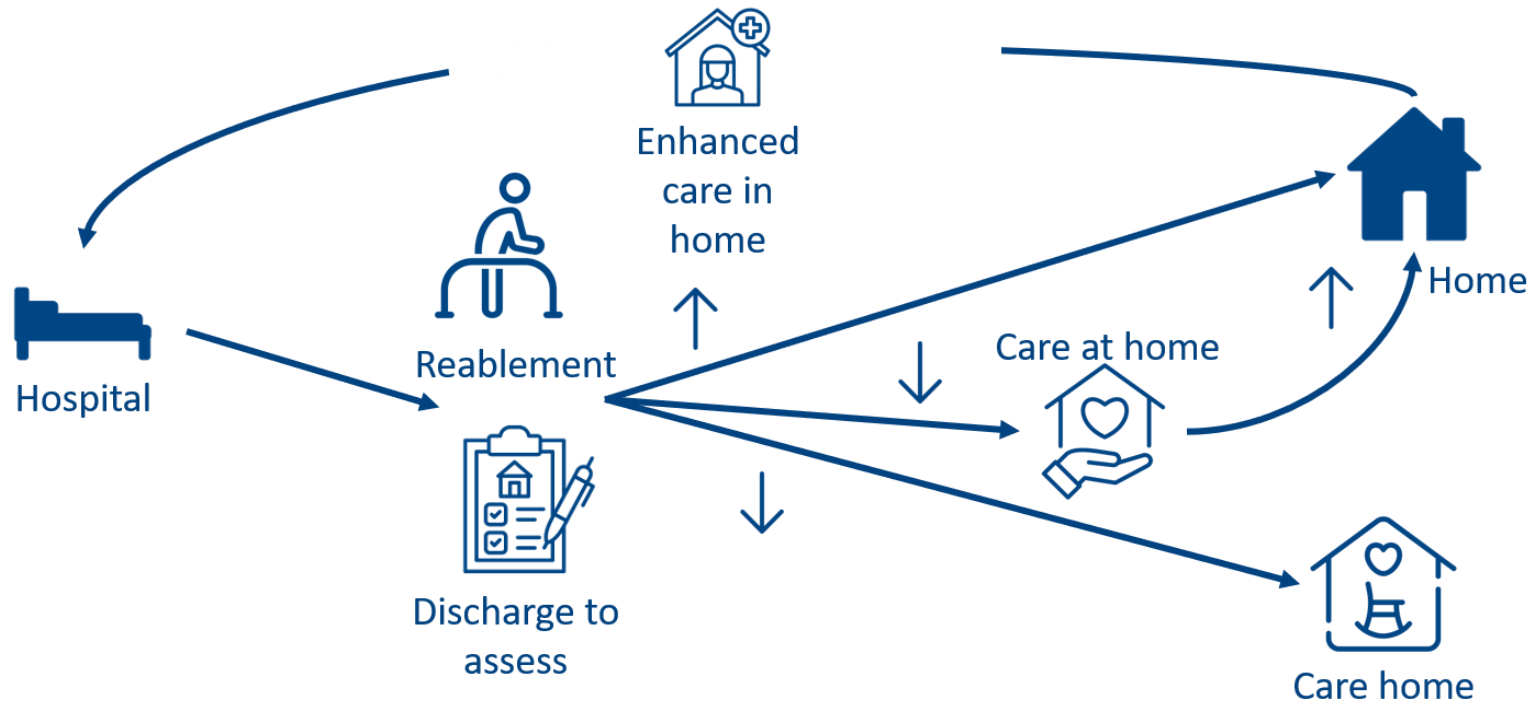
- Two speed system of referral and signposting
- Decisions made in acute entrenched silos
- Lack of circularity – have to 'start again' if needed

Understanding balance



- Understanding where the volume is
- Spark questions about appropriateness of connections
- Support investment decisions

Understanding interdependencies

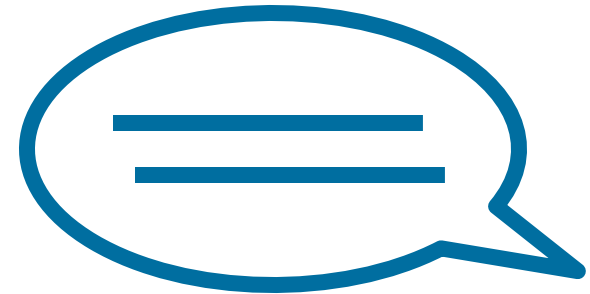
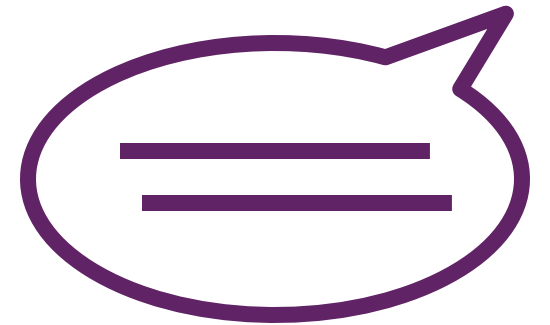
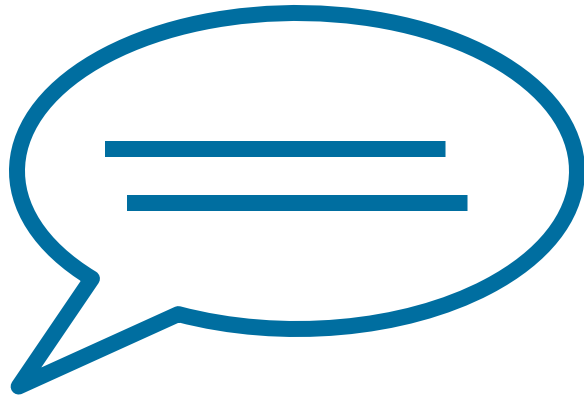


- Systems are linked and can be continuous loops
- When capacity is noted as a factor this changes how we might think about flow
- System maps can show a temporal factor

Key takeaways

- Start somewhere and go everywhere
- Don't get trapped in siloed definitions
- Services are verbs, not nouns
- Be judicious when layering data and information

Q&A



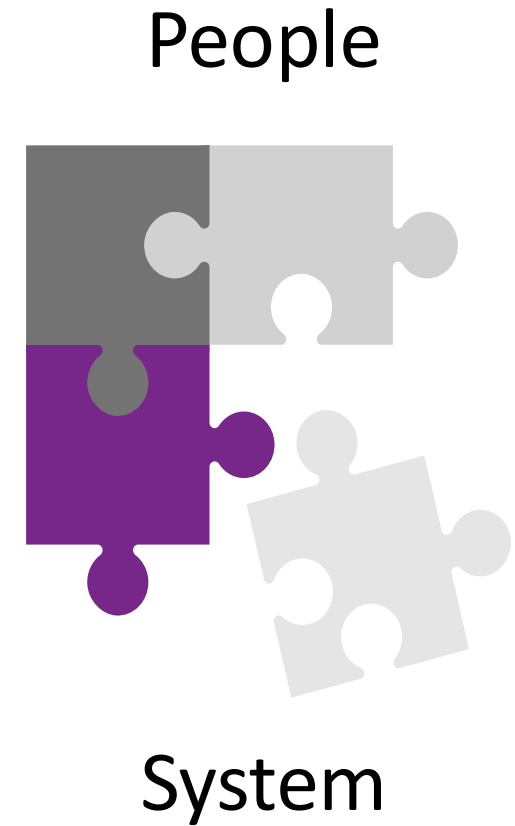
Bringing it all together

Des McCart, Senior Programme Manager, Healthcare Improvement Scotland

Seeing the whole picture



- Engagement
- Journey Mapping
- Process Mapping
- System Mapping

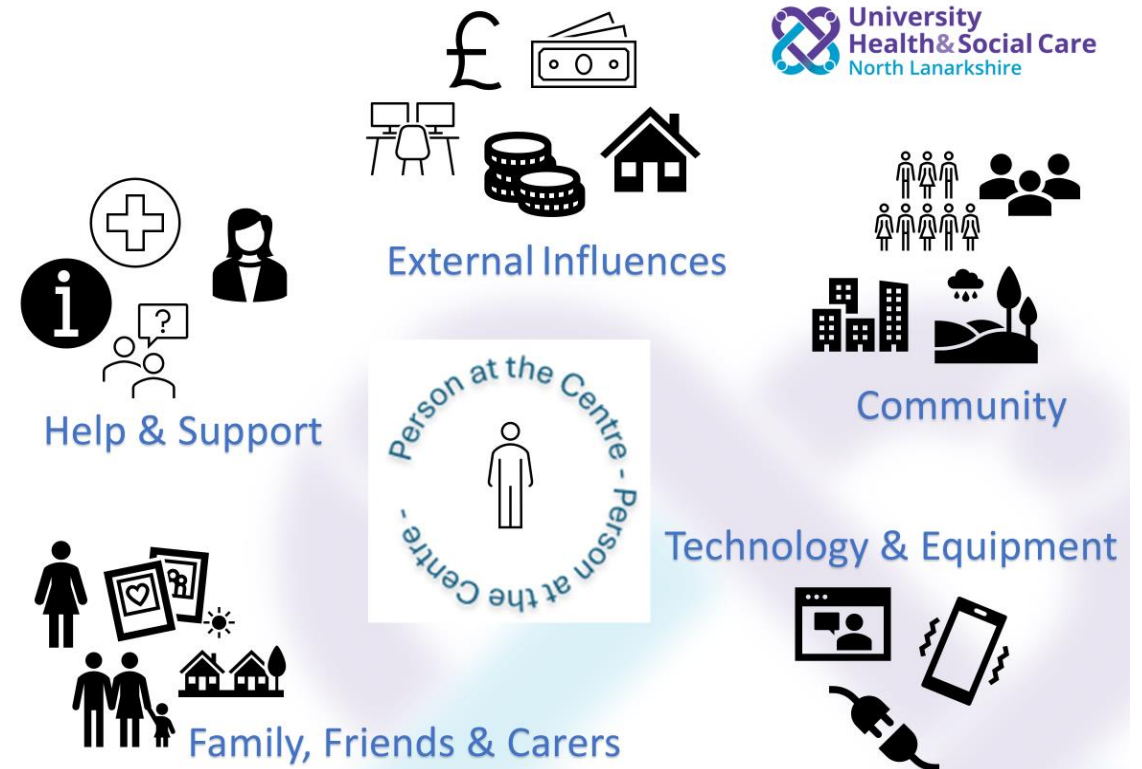


In practice – North Lanarkshire - Getting it right for everyone

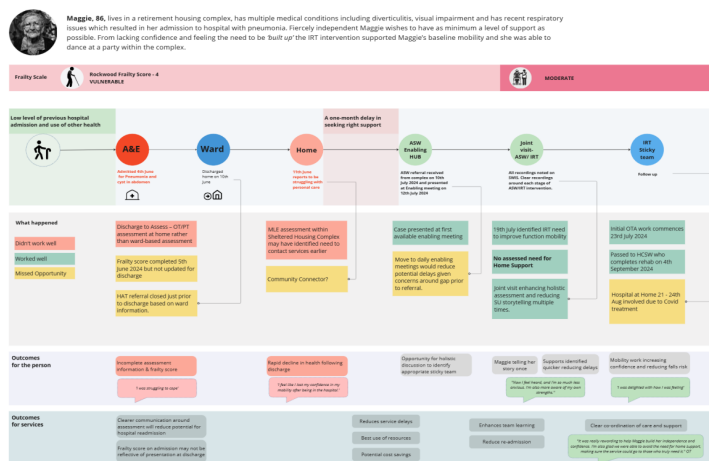
Whole system



- Place based
- People Focused
- Family focused
- Improving lives
- Home First
- Doing the right thing



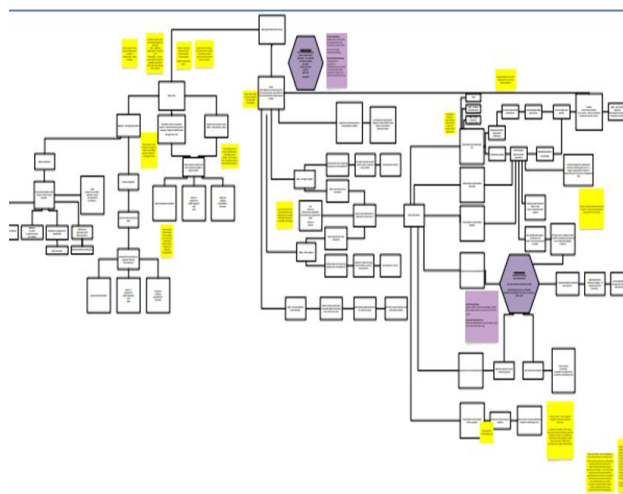
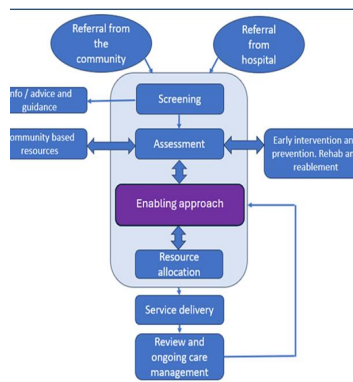
Understanding the whole picture – People, processes and system



Informed by people's experience

Provided context to start from where we were at

Illustrated the journey for people



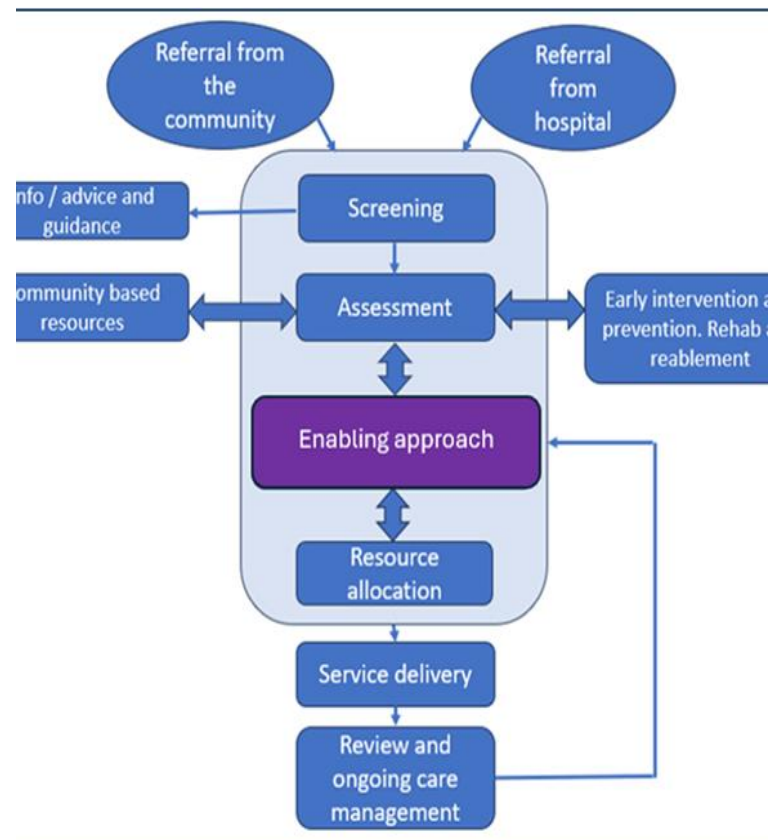
Demonstrated the impact of practice

Supported discussions across the system

Enabling Approach

Assessment

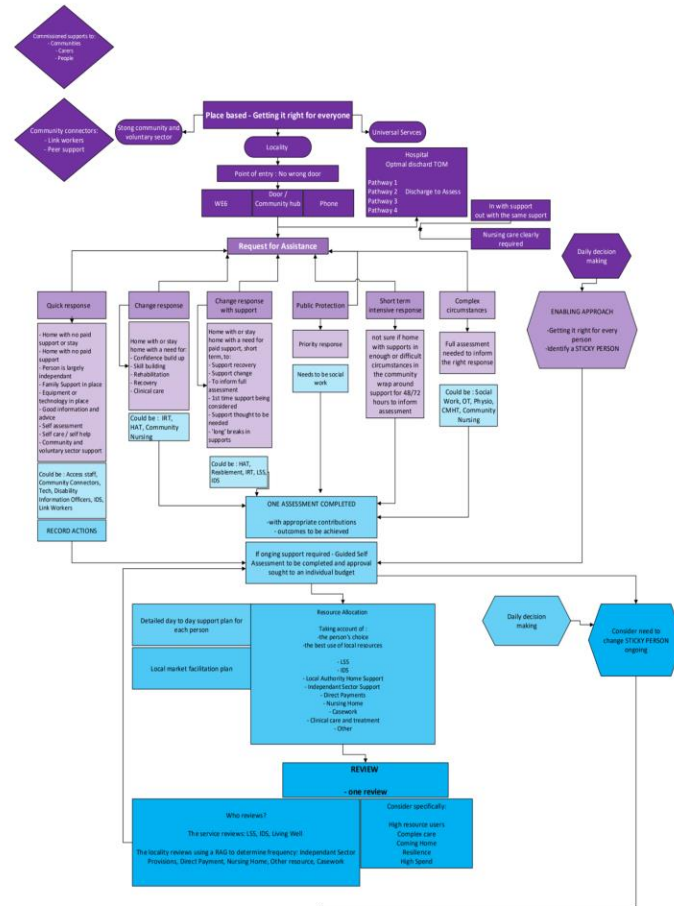
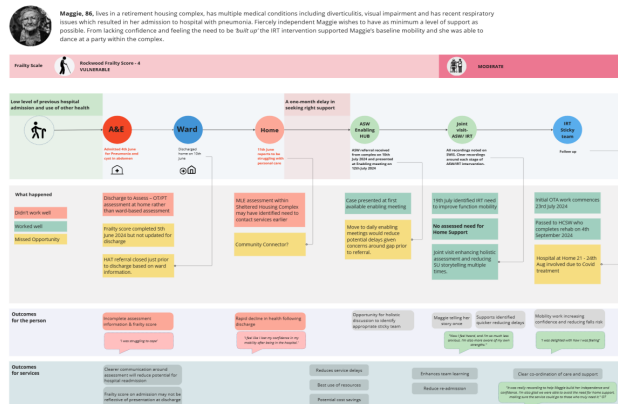
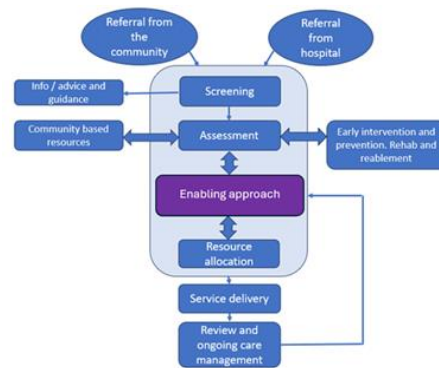
- One assessment
- Assess at home
- People are empowered to use their own resources and resourcefulness first
- No waiting
- Using people resources within and attached to locality
- Changing the way we work not the structure we work in
- Relationships and trust



Resource Allocation

- Decision making closest to the person
- Quicker decision making
- Empowering practitioners and team leads
- Increasing flexibility and creativity
- Local market facilitation

2025: Operating Model



Robust whole system approach

One assessment

At home

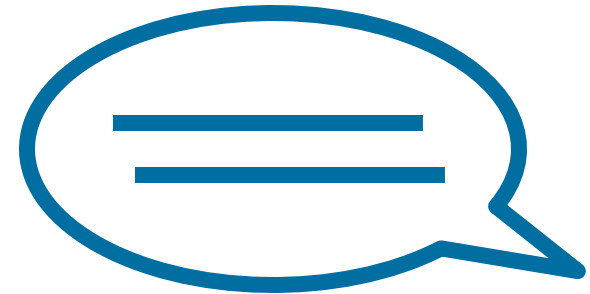
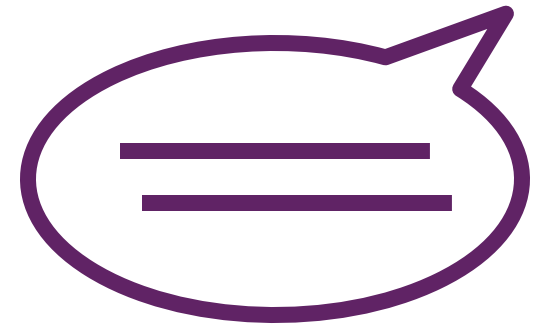
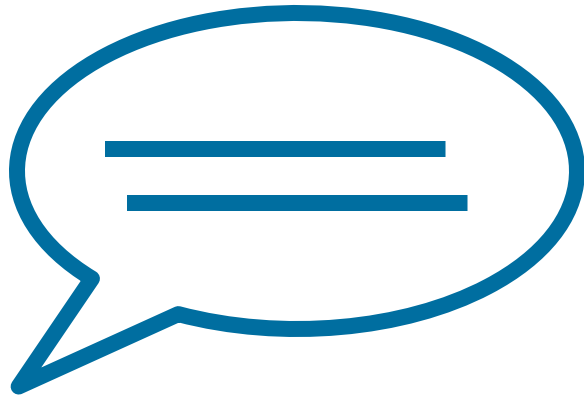
Led by a sticky person

Rehab / reablement for (just about) everyone

One review

Led by a sticky person

Q&A



Feedback – polls

How would you rate this event?

What worked well?

What might have been even better?

Our next Learning Community activity

We will be hosting a:

Scottish Approach to Change Reflective Practice Session

On 23 September 2026 at 12.00-1:00pm

Registration coming soon!

Thank you!

If you would like to contact the team, please email his.satc@nhs.scot