Consumer engagement flow chart

**Discover**

Define the aim and scope of the activity. You may wish to undertake an environmental scan, review feedback from patient experience surveys and in RISKMAN, consult with staff and read the [inclusive engagement toolkit](#) to help guide you.

Discuss the project with your manager and your consumer engagement lead. There are engagement leads in each Directorate who can help you.

**Plan**

The [Partnering with consumers Procedure](#) and [Guideline](#) can guide you.

Define the activity in a consumer engagement activity description. This can be used to promote the opportunity to consumers. This must include if reimbursement and remuneration will be offered and at what level (see [Partnering with consumers Procedure](#), [Reimbursement and remuneration](#) and [Gift Cards Procedure](#) for more information) and talk to your engagement lead to seek approval to access the consumer engagement budget.

**Invite**

Determine the method and channels you will use to promote the activity and if consumers can apply directly such as by email or phone or formally through a consumer engagement expression of interest.

Promote the activity and seek interest from consumers.

Meet with consumers (ideally face-to-face) who have expressed interest to discuss the activity and their interest. Determine who the successful consumer(s) is and invite them to participate.

**Prepare**

Provide the consumer with an orientation to the activity and service, the Directorate and Metro North Hospital and Health Service. Have them sign an engagement agreement. If providing reimbursement (and remuneration), have them complete the vendor set-up form and statement by supplier form and submit these to your Directorate Business Support Officer.

Prepare staff who are involved in the activity to help facilitate the transition of the consumer into the activity.

Have your engagement lead register the consumer and activity on the Consumer Engagement SharePoint database.

**Support**

Provide ongoing support to the consumer throughout the activity. Ensure there are opportunities to allow the consumer to communicate and provide feedback, such as ‘checking in’ with them regularly via email or phone.

Support the consumer to complete a consumer expense claim form if they are eligible to claim reimbursement or remuneration or if providing a gift card, follow the [Gift Cards Procedure](#).

**Review**

Thank the consumer for their involvement. You may like to offer a [certificate of recognition](#).

Involve the consumer in an evaluation including of the overall activity, outcomes achieved and of their involvement as a consumer. This is an opportunity to learn for future consumer engagement activities.