IHQSE CTP 2018
Improvement Session 3
Transitioning to the Planning Phase
Debrief

1. Share a leadership story at your tables. (10 mins)
2. Listen to Review articles and chapter.
Driving A Culture of Quality

- Multiple methodologies that address our most pressing improvement needs.
- Easily scaled to meet the demands of the specific project
- Focus on Lean and Facilitative Leadership now with an eye to more data dependent work later.
Structured Project Lifecycle

- **Initiate**
  - Select a Project and Gain Approval
  - Generate Awareness and Desire for the Project

- **Plan**
  - Define Project Scope and Team Members
  - Understand Current State and Measure It
  - Decide on Improvements and Communicate the Vision

- **Execute**
  - Test Improvements
  - Measure Results
  - Empower Stakeholders to Act

- **Monitor**
  - Check for Sustained Impact
  - Formalize Improvements
  - Don’t Let Up

- **Close**
  - Change Systems and Structures to Sustain Change
  - Make It Stick
The Planning Phase

Three Steps to Success: Define, Measure and Analyze THE CURRENT STATE
11 Tools, 3 Topics

1. Define - goal is sense-making
   - 5 Whys and Fishbone Diagram (Ishikawa Diagram)
   - Pareto chart
   - Process Map
   - Spaghetti Diagram
   - Project Charter

2. Measure - current state performance
   - Data collection planning
   - Basic data analysis and run charts

3. Analyze - support your improvement choices
   - Lean methodology - forms of waste
   - PDSA
Ordering and administering a medication to a patient

**Suppliers**
- Provider
- Pharmacy
- EPIC

**Inputs**
- Provider order
- Patient info (weight, allergies, other meds)
- Medication
- EPIC

**Process**
- Order the Med
- Pharmacy Review
- Prepare Med and Deliver
- RN Receives and Checks
- Administer Med to Patient

**Outputs**
- Prepared Medication

**Customers**
- RN
- Patient

**Requirements**
- Right med
- Right Patient
- Right dose
- Right route
- Right time
- Right reason
- Right documentation
Making Effective Group Decisions

Three Stages of a Discussion

OPEN
Gather ideas, opinions, data and information

NARROW
Organize the information for better understanding and evaluation

CLOSE
• **Summarize** the proposed decision or action item
  • **Check** for Understanding
  • **Check** for Agreement

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Fishbone

<table>
<thead>
<tr>
<th>Potential Causes</th>
<th>Effect</th>
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<tbody>
<tr>
<td>Process</td>
<td></td>
</tr>
<tr>
<td>People</td>
<td></td>
</tr>
<tr>
<td>Policy</td>
<td></td>
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<tr>
<td>Physical Plant</td>
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<tr>
<td>Machine</td>
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</tbody>
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The Problem
Pareto Chart Example

-- Use to group data into categories of descending frequency to help focus your efforts

Pareto of Patient No-Show Reasons

Count of Reasons

- Patient forgot: 24 (61%)
- Scheduling error: 7 (18%)
- Traffic: 2 (5%)
- Other emergency: 1 (3%)
- No reason given: 1 (3%)

Cumulative %

0% 20% 40% 60% 80% 100% 120%
What is a Process Map?
Understanding Process Maps

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Name</th>
<th>Purpose</th>
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<tbody>
<tr>
<td></td>
<td>Process</td>
<td>Shows an Action Step</td>
</tr>
<tr>
<td></td>
<td>Flow Line</td>
<td>Shows Direction Between Steps</td>
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<tr>
<td></td>
<td>Decision</td>
<td>Question, Decision-point, or Branch in Flow</td>
</tr>
<tr>
<td></td>
<td>Termination</td>
<td>Start/Stop Point</td>
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Spaghetti Diagram
Work needs to be done in both domains to assure success.

<table>
<thead>
<tr>
<th>Project</th>
<th>Team</th>
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</thead>
<tbody>
<tr>
<td>• Clear Problem Statement</td>
<td>• Right People</td>
</tr>
<tr>
<td>• Well Scoped</td>
<td>• Clear Roles</td>
</tr>
<tr>
<td>• Clear Goal</td>
<td>• Clear Decision Making</td>
</tr>
<tr>
<td></td>
<td>• Clear Purpose/Mission</td>
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Picking A Team

Some Guiding Principles:

• Get a good cross slice of the organization
• Pick people with knowledge and influence- use the SIPOC and Stakeholder Analysis Tool to help you recruit help
• Use team building tools to get off to a good start
Activity

Plan your first team meeting. What will you accomplish and with whom? Use the meeting template from last time. Pick one tool that you will use.