Develop Lean Capabilities Through Lean Learning Cycles

Jamie Klimp and Patricia Craig, RN
Continuous Improvement Consultants
Bronson Healthcare System
AME SELFIE NETWORKING CONTEST!

Take a selfie with your friends, colleagues, strangers, speakers, facilitators and anyone you meet at AMECinci and email to networking@ame.org

Participants who take selfies with the most people will win daily prizes.

The participant who has taken selfies with the most people throughout the conference wins the Grand Prize!
Bronson Continuous Improvement Support
Bronson Healthcare System
System Statistics

Workforce:
• 7,700 employees
• 1,100+ medical staff members
• 972 volunteers

Patient Care:
• 3 Hospitals
• 82 outpatient medical practices
Bronson Medical Group Practices

Developing Lean Capabilities
• Engraining PDSA into daily thinking
• Creating coaching capabilities in leaders
• Engaging all employees in problem solving
“Develop Lean Capabilities Through Lean Learning Cycles”
Learning Cycle:
Lean development program taught and supported by lean professionals.
Bronson’s Lean Journey

Continuous Improvement Team


Kaizen Events

Lean Simulation Training

Daily Huddles

Value Stream Identification and Projects

Gemba Walks

Learning Cycles

Participation in Lean for Clinical Redesign

2/14 to 7/15
Lean for Clinical Redesign

What: Collaborative Process Initiative staffed by University of Michigan and funded by BCBSM.

What is Patient Centered Medical Home?

- A team approach to health care led by your primary care physician
- Provides a central point of access to health care professionals, medical records and complementary care

Source: SlideShare
“Medical homes can lead to higher quality and lower costs, and can improve patients’ and providers’ experience of care.”

National Committee for Quality Assurance
Lean for Clinical Redesign

Why: To provide a learning opportunity that resulted in sustainable changes within the Physician Organizations.
Physician Organization Development

BRONSON

Cycle 1
Observe

Cycle 2
Partner

Cycle 3
Independent
Who is the Coach?

BRONSON
Practice Coach

BRONSON
Continuous Improvement Coach

Lean Coach
Lean for Clinical Redesign
Learning Cycle Model

Week 1: PO & Clinic Coach Readiness Session 1
Week 2: PO & Clinic Coach Readiness Session 2
Week 3: Lean Thinking & Simulation
Week 4: Current State & Value Stream Mapping
Week 5: Problem Definition & PDSA
Week 6: PDSA Coaching Session
Week 7: Target Condition & PDSA
Week 8+: Weekly PDSA Coaching Sessions at Clinics

Monthly Collaborative Shared Learning Sessions

Foundational Learning
Learning Cycle Cohorts

3 to 6 Medical Practice Teams
Teams
Learning Cycle Sessions

Foundational Learning

Weekly PDSA Coaching sessions at Clinics (30 minutes each)
Monthly Collaborative Shared learning sessions
Developing Coaching Capabilities

Provide opportunities for the Coach to learn and practice:

– Their role as Coach
– Lean problem solving skills
– Listening and asking good questions
– Empowering the team to solve problems
– Removing barriers
Coach Readiness
Questioning Mind

“It is more useful to provide the right question than the right answer.”

- John Shook
Learning Cycle Sessions

Coach Readiness 4 hours

Lean Simulation

Value Stream Map 8 hrs

Problem Definition 6 hrs

PDSA Coaching Session 30 Min

SMART Goal and Root Cause

Weekly PDSA Coaching sessions at Clinics (30 minutes each)

Monthly Collaborative Shared learning sessions

Foundational Learning
Simulation

- Provider
- Lab Technician
- Observer
- Patient
- Front Desk
- Medical Assistant
Learning Cycle Sessions

Foundational Learning

- Coach Readiness: 4 hours
- Lean Simulation: 8 hrs
- Value Stream Mapping
- Problem Definition: 6 hrs
- PDSA Coaching Session: 30 Min
- SMART Goal and Root Cause

Weekly PDSA Coaching sessions at Clinics (30 minutes each)
Monthly Collaborative Shared learning sessions
Value Stream Mapping
Go and See

- Go see
- Ask why
- Show respect
- Listen
Collect Data

Keep it Simple
Ideal Vision

- Alignment around improvement
- Focus on value, as defined by the customer
Learning Cycle Sessions

- **Coaches**: Coach Readiness 4 hours
- **Lean Cycle Team**: Lean Simulation 8 hrs
- **Value Stream Map**: 8 hrs
- **Problem Definition**: PDSA Coaching Session 30 Min
- **SMART Goal and Root Cause**: Weekly PDSA Coaching sessions at Clinics (30 minutes each)
  Monthly Collaborative Shared learning sessions

Foundational Learning
Problem Selection
Problem Definition

- **Title**: Background
- **Root Cause Analysis**
- **Current Condition**
- **PDSA Cycles**
- **Target Condition**
Process Mapping

- Process Map
- Collect Data
- Go & See
Learning Cycle Sessions

- Coach Readiness 4 hours
- Lean Simulation 8 hrs
- Value Stream Map 8 hrs
- Problem Definition 6 hrs
- PDSA Coaching Session 30 Min

SMART Goal and Root Cause

Weekly PDSA Coaching sessions at Clinics (30 minutes each)
Monthly Collaborative Shared learning sessions

Foundational Learning
SMART
Specific
Measurable
Attainable
Relevant
Time Based
Root Cause

 OUR DEPRESSION SCREENING RATE IS CURRENTLY AT 18% AND OUR SMART GOAL IS 50% IN 90 DAYS

PTS DON'T RECEIVE THE FORM FROM THE FRONT DESK
- FD DOESN'T GIVE PT THE SCREENING FORM
  - FD DOESN'T CHECK TO SEE IF PT NEEDS FORM
  - FD CHECKS EMR WHICH SHOWS THAT THE FORM WAS HANDED OUT
    - THE STANDARD WORK FOR FD IS ONLY TO MARK WHEN PTS ARE GIVEN THE FORM

PTS DON'T RETURN THE SCREENING FORM
- PTS DON'T COMPLETE THE FORM
  - FD CHECKS EMR WHICH SHOWS THAT THE FORM WAS HANDED OUT

PTS DON'T RETURN THE SCREENING FORM
- PTS FORGET TO RETURN THE SCREENING FORM
  - NO ONE ASKS THEM FOR THE FORM

MAS DON'T RECORD THE FORM
- THEY ARE BUSY WITH OTHER TASKS
  - THERE'S NO PRIORITY FOR THEIR TASKS
  - THEY WERE NOT TRAINED REGARDING DEPRESSION SCREENINGS
  - NOT ALL MAS KNOW WHEN, WHERE, OR HOW TO RECORD RESULTS

MA DON'T KNOW WHICH PTS NEED TO RETURN THE FORM
- IT'S NOT CLEAR OR EASY TO IDENTIFY PTS WHO NEED TO RETURN THE FORM

Used with permission from:

Association for Manufacturing Excellence
Share, Learn, Grow
Learning Cycle Sessions

- **Coach Readiness**: 4 hours
- **Lean Simulation**: 8 hrs
- **Value Stream Map**: 8 hrs
- **Problem Definition**: 6 hrs
- **PDSA Coaching Session**: 30 Min
- **SMART Goal and Root Cause**

Weekly PDSA

Monthly Collaborative Shared learning sessions

**Foundational Learning**
PDSA Sessions

30 Minute
Problem Solving Time
Coach Development
PDSA Path

Current

Facts

Future

Vision

Understand the Situation

Understand the Situation

Understand the Situation

Understand the Situation

Plan

Act

Do

Study
### PDSA Record

**Plan**
- Date
- Step
- Summary of Trial
- What do you expect? Why?
- Date before and after doing a trial

**Do**
- Date before and after doing a trial
- What actually happened? What did you learn?

**Study**

**Act/Adjust**
- Next steps

Captures PDSA Learning
What is the experiment and the expected result?
## PDSA Record

<table>
<thead>
<tr>
<th>Date</th>
<th>Step</th>
<th>Summary of Trial</th>
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<th>Data BEFORE trial (N/A if not doing a trial)</th>
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<th>What did you learn?</th>
<th>Next Steps</th>
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</table>

What was learned?
## PDSA Record

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</table>

Next Steps?

**Next Steps:**
- Common More Data □
- Run a Trial □
- Adjust (new entry) □
- Make Standard □ (describe how)
# Standard Work Sheet

**Process:** PDSA Session Standard Work (followed by Practice Coach, may rotate)

<table>
<thead>
<tr>
<th>Time</th>
<th>Major Step</th>
<th>Key Points</th>
<th>Reason Why</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 min</td>
<td>Present Board Documents (team members rotate)</td>
<td>- With Team @ board</td>
<td>• Orients team/observers to improvement work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Training for LDM Board presentation</td>
<td>• Documents assist telling the story</td>
</tr>
<tr>
<td>5 min</td>
<td>2) Read the last step taken on the PDSA cycle record</td>
<td>Ask the Team to reflect on the last step.</td>
<td>• Respect for people doing the work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What are we learning from the data?</td>
<td>• Provides study of the Last Step taken</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What did you expect?</td>
<td>• Learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What Obstacles do you think are preventing you from reaching the Target</td>
<td>• Determines Next Step</td>
</tr>
<tr>
<td></td>
<td></td>
<td>condition or Goal?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Write on the PDSA cycle record:</td>
<td>• What was the ‘after’ metric?</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What actually happened?</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What did we learn? Better, Same, Worse</td>
<td></td>
</tr>
<tr>
<td>10 min</td>
<td>3) Ask the Team to Plan Next Steps</td>
<td>Write on the PDSA cycle record:</td>
<td>• Respect for people doing the work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Will we need to Grasp the Situation or try a new Countermeasure?</td>
<td>• Provides clear plan for team</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Idea to try? (use Experiment Planning Checklist)</td>
<td>• Provides terms by which team can evaluate the Countermeasure</td>
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<tr>
<td></td>
<td></td>
<td>• What is the metric value ‘before’?</td>
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<tr>
<td></td>
<td></td>
<td>• What do you expect to happen? Why?</td>
<td></td>
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<td></td>
<td></td>
<td>• Create Board Documents/Data Collection tools, if necessary</td>
<td></td>
</tr>
<tr>
<td>10 min</td>
<td>4) Create Board documents/Data Collection tools</td>
<td>• Create Board Documents/Data Collection tools, if necessary</td>
<td>• Respect for people doing the work</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Documents/Tools assist team to study and share story</td>
</tr>
</tbody>
</table>
Learning Cycle Sessions

Foundational Learning

- Coach Readiness 4 hours
- Lean Simulation 8 hrs
- Value Stream Map 8 hrs
- Problem Definition 6 hrs
- PDSA Coaching Session 30 Min
- SMART Goal and Root Cause

Weekly PDSA Coaching sessions at Clinics (30 minutes each)

Monthly Collaborative
Share & Encourage Learning Monthly
Results

- 27-68
- 3
- 73%
- 86%
- 12%
- 64%
- 57%
- 85%

0
745
Challenges & Lessons Learned

• Teams need patient perspective
VALUES
Integrity • Patient and Family Centered Care • Teamwork
Evidence-Driven Improvement • Education • Community Commitment

MISSION
Together, we provide excellent healthcare
Patient Experience

- Represent the Patient Experience
- Represent the Family
- Help us see what patients see
- Don’t identify with obstacles
- Challenge the status quo
- Learn, Improve and Celebrate Together!
Challenges & Lessons Learned

• Teams need patient perspective
• Practices need to be ready
Practice Readiness
Readiness Considerations
Team Member Requirements

✓ Flexible and open minded
✓ Respectful, direct and truthful
✓ Share information and fully participate
✓ Commit to the team’s goals and vision
Challenges & Lessons Learned

• Teams need patient perspective
• Teams need to be ready
• Leadership self development
Development Model

Commit to Self Develop

Lean Leader

Create Vision and Align Goals

Support Daily Kaizen

Coach and Develop Others

Adapted from Liker & Convis 2012
<table>
<thead>
<tr>
<th>Traditional Culture</th>
<th>Lean Culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers Direct</td>
<td>Managers Teach/Enable</td>
</tr>
<tr>
<td>Gain Information Through Meetings</td>
<td>Understand Through Go See, Ask Why &amp; Show Respect</td>
</tr>
<tr>
<td>Have the Right Answers</td>
<td>Ask the Right Questions</td>
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<tr>
<td>Blame People</td>
<td>Blame the Process</td>
</tr>
<tr>
<td>Data, Data and More Data</td>
<td>Purposeful Data Collection &amp; Use</td>
</tr>
<tr>
<td>Guard Information</td>
<td>Share Information</td>
</tr>
<tr>
<td>Fire Fighting</td>
<td>Understand and Fix Root Cause</td>
</tr>
<tr>
<td>“Expert” Driven, Periodic Improvement</td>
<td>Staff Driven, Continuous Improvement</td>
</tr>
</tbody>
</table>
Lean Leader Role

GET WORK DONE
DEVELOP PEOPLE

Source: Karen Martin
Lean Leadership
A3 Thinking & Practice

Diagram:
- Observer
  - 3m
- Problem Owner
  - 1st
  - 4min
  - 9min
- Reviewer
  - 2min
  - 2nd

Time:
- 3 minutes
- 2 minutes
- 4 minutes
- 9 minutes
- 2 minutes
Challenges & Lessons Learned

• Teams need patient perspective
• Teams need to be ready
• Leadership self development
• Engage the entire Practice
Engaging the Entire Practice
Practice Sharing Sessions
Map Feedback
## Problem Solving Documents

### PDSA Record

<table>
<thead>
<tr>
<th>Date</th>
<th>Step</th>
<th>Summary of Trial</th>
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</tbody>
</table>

*Next steps include:
- Conductive Data
- Run a Trial
- Adjust
- Monitor
- Note Standard
- (describe the test)*
Idea Generation
Challenges & Lessons Learned

- Teams need patient perspective
- Teams need to be ready
- Leadership self development
- Engage the entire Practice
- Understand any resistance
<table>
<thead>
<tr>
<th>DESIRE FOR CHANGE</th>
<th>D * V * F &gt; R&lt;sup&gt;1&lt;/sup&gt;</th>
<th>How to Engage</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Dissatisfaction with the current state</td>
<td>• Value Stream Map</td>
<td></td>
</tr>
<tr>
<td>• Willingness to learn a better way</td>
<td>• Problem Definition</td>
<td></td>
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<tr>
<td></td>
<td>• Understand the Situation</td>
<td></td>
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</tbody>
</table>

| VISION | • What we want to create or achieve together | • Ideal Vision |

| FIRST STEPS | • What we are going to do to learn and improve towards our vision | • PDSA Session |

| RESISTANCE | • Resistance is a sign that you have touched on something valuable | • Share and include staff in all of the above |
| | • Surface, understand, and respect resistance<sup>2</sup> | |

<sup>1</sup> Developed by Kathleen Dannemiller  
<sup>2</sup> Adapted from *Flawless Consulting* by Peter Block
Challenges & Lessons Learned

• Teams need patient perspective
• Teams need to be ready
• Leadership self development
• Important to understand resistance
• Create ways to engage entire practice
• Sustaining improvements is difficult without routines/habits
Knowledge ≠ Understanding
Learning Cycle

Knowledge

Apply

Understanding

Lean Simulation  Team Application  PDSA Sessions
Huddle Daily
<table>
<thead>
<tr>
<th>Step</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>1 Minute</td>
</tr>
<tr>
<td>Critical Communication</td>
<td>2 Minutes</td>
</tr>
<tr>
<td>Daily Metric Discussion</td>
<td>3 Minutes</td>
</tr>
<tr>
<td>Rewards &amp; Recognition</td>
<td>1 Minute</td>
</tr>
<tr>
<td>Ideas in Motion</td>
<td>3 Minutes</td>
</tr>
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</table>
Problem Solve Weekly
Share & Encourage Learning Monthly
• Engrain PDSA into daily thinking
• Create coaching capabilities in leaders
• Engage all employees in problem solving
QUESTIONS?
Thank You!

Please complete the session survey at:
www.ame.org/survey

Session: TP/13
Developing Lean Capabilities Through Repeated Learning Cycles
Patricia Craig, RN and Jamie Klimp
Bronson Healthcare Systems
klimpj@bronsonhg.org