Building a lean daily engagement system: the PAMF experience

Rupal Badani MD
Joann Falkenburg MD
Valeska Henderson RN, MBA
Erica Weirich MD

IHI International Summit 2014
Session L3
These presenters have nothing to disclose

Why Change?

How many reasons do we need?
• 760,000 reasons: patients
• 7000 reasons: employees
• 1300 reasons: physicians

Value based care looms large on the horizon
Why Lean?

Model Line Approach
How is this different?

Lean - *Appears to be a technical system*
- 20% of implementation – use the tools, change the process

Lean – *Actually is a way of thinking*, a philosophy and daily discipline
- 80% of implementation - a new focus

Parallel implementation of lean management system with improvement events:
- Lean practice means that in order to change: **focus on “process”**
  - *New thinking follows new practices*........

Our improvement pledge

- Challenge current thinking.
- Use our minds first, before our money.
- Look for leadership at all levels.
- Substitute “we can’t” with “we don’t know how to do that yet.”
- Remember that you are the experts.
- Be hard on the process but easy on the people.
- It’s better to find 50% improvement today than wait to achieve perfection.
- Don’t just plan, do!
Creating a Daily Engagement System

JNC 8: released 12/20/13

How will you confirm adherence?

• Assume providers are educated and implementing guidelines, they’re licensed and board certified right?

• Hand out new guidelines: instruct teams to read and implement

• Measure outcomes:
  • Obtain data
    • Often: blame, shame, ignore

• Check on implementation:
  • Share metrics
  • Chart biopsy

• Improvement events
  • HTN kaizen
JNC 8: released 12/20/13

Could you engage front line teams in a new way?

- Share information and basic training in daily huddles
- Discuss guidelines using local experts in stand up meetings
- Share visible data in a safe, transparent environment to elicit feedback and implementation ideas.
- Front line observation of teams
- Front line improvement projects: team led and data driven.

Key elements to PAMF daily engagement

- Executive sponsorship and example
- Standard calendar for rounding
- Visual management
- Tiered checking
- Standard work flows for front line teams and leaders
### PAMF’s Management Structure

#### Front Line
- **Create Value for Our Patients**
- **Support & Remove Barriers**
- **Physicians, Patient-Facing Staff, Non-management Staff**
- **Tier 0 Managers/Department Heads**
- **Tier 1 Directors/Division Heads**
- **Tier 2 Vice Presidents, VP Ops, Divisional Medical Directors & Support Leaders**
- **Tier 3: C-Suite (CEO, CDO, CFO, CMIO, Regional Presidents, etc.)**

#### Meetings

<table>
<thead>
<tr>
<th>Tier</th>
<th>Huddle</th>
<th>Attendees</th>
<th>Checking Frequency/Time</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Huddle</td>
<td>Front line team, provider and nurse or medical assistant</td>
<td>Every day/30 minutes</td>
<td>Review of the day (anticipate patients, add or edit schedule)</td>
</tr>
<tr>
<td>0/1</td>
<td>Huddle</td>
<td>Department/pod huddle</td>
<td>Weekly/15 minutes</td>
<td>Look forward at schedule (access, outreach)</td>
</tr>
<tr>
<td>1</td>
<td>Stand Up</td>
<td>Team: Dept Head, Dept Mgr, providers, medical assistants, nurses. Big departments should break into smaller teams with dept/leader rotating through</td>
<td>One time per week/30 minutes</td>
<td>Review the week - planned versus actual for the previous week - planned for this week - clinic information - organizational information - improvement planning</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Site or Divisional Meetings</td>
<td>One time per month/60 minutes</td>
<td>Planned versus actual - celebrate success - improvement planning</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Sutter SMT</td>
<td>One time per month/60 minutes</td>
<td>Planned versus actual operational measures - breakthrough improvements status</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>PAMF Leadership - CMO, CDO, PAMF Senior Management Team</td>
<td>One time per month/60 minutes</td>
<td>Planned versus actual enterprise measures - strategic breakthroughs status</td>
</tr>
</tbody>
</table>

#### Standard Calendar

<table>
<thead>
<tr>
<th>Day</th>
<th>Meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>PAMF Senior Management Team</td>
</tr>
<tr>
<td>Tuesday</td>
<td>Site or Divisional Meetings</td>
</tr>
<tr>
<td>Wednesday</td>
<td>RMD Council/QLT</td>
</tr>
<tr>
<td>Thursday</td>
<td>Gemba (To check, coach and learn)</td>
</tr>
<tr>
<td>Friday</td>
<td>Open</td>
</tr>
</tbody>
</table>
Front line/care team standard work

• Daily dyad huddle, flow
• Attend daily department/pod huddles
• Attend weekly stand up meetings
• Give feedback early and often
• Measurement as needed (in process metrics, front line improvement)
• Recognize and celebrate

Front line standard work

Co-located teams and standard work in flow
How is Leader Standard Work Different?

**A Day in the Life of a Conventional Leader**
- Reactive mode
- Everything is urgent
- Meetings, meetings, meetings
- Delivered reports give a “rearview mirror” look at performance (defects, productivity, inventory)

**A Day in the Life of a Lean Leader**
- Proactive mode
- Problem solving environment
- Leaders are in the workplace (Gemba) to learn, coach and improve staff’s thinking
- Performance measures are real-time

Lean leader standard work
- Plan and run daily department/team huddle
- Plan and run weekly stand up meetings
- Plan and participate in weekly gemba walks
- Complete front line observations (gemba)
- Make information/data visible
- Close feedback loops (preferably in a visible way)
- Training and coaching
- Recognize and celebrate
Leader Standard Work

Standards and Metrics

Process Focus!

Daily Accountability

Visual Management

Planning for Department Daily Huddles

Process Map – Daily Team Huddles

Prep for Huddle

Gather team

Conduct Huddle

End Huddle

Follow Up

Examples:
- Gather data
- Gather schedules
- Update visual boards

• Use something (music, bell, etc.) to prompt people to gather
• Start on time

Examples of Content:
- Welcome *
- Access * (Patient schedules and needs)
- Staffing/Roas *
- Team well being *
- Review of Tier 1 (daily)*
- Review of Tier 2 metrics (weekly)#
- Initiative roll out#
- Implementation check (how going)#
- Announcements
- Reminders
- Clinical pearls
- Recognition
- Stories
- Education
- Ancillary updates
- PDCA
- A3 Thinking

End on time

Positive ending

• Track issues
• Triage to next steps
• Bring back to team
### PAMF Daily team huddle

5 minute team gathering

**Tier 1 leader updates huddle board**

### Process Agenda Weekly Stand Up Meeting

<table>
<thead>
<tr>
<th>Prep for Meeting</th>
<th>Gather team</th>
<th>Conduct Meeting</th>
<th>End Meeting</th>
<th>Follow Up</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Examples:</strong></td>
<td>Use something (music, bell, etc.) to prompt people to gather</td>
<td>Mandatory to include *</td>
<td>Optional to include #</td>
<td></td>
</tr>
<tr>
<td>• Gather data</td>
<td>Start on time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Gather schedules</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Update visual boards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Create this week’s agenda</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Examples of Content:**

- Welcome *
- Access *
- Staffing *
- Announcements *
- Review of tier 1 metrics *
- Clinical pearls *
- Education *
- A3 problem solving projects *
- Recognition *
- Steward *
- Special coverage situations upcoming *
- Initiative roll out *
- Implementation check (flow going) *
- Reminder *
- Introduction of new people to dept # *
- PDCA *
- Other

- End on time
- Positive ending

**Follow Up**

- Track issues
- Triage to next steps
- Bring back to team
- Post minutes on board
PAMF Weekly stand up meeting

Training tools

- We use training within industry model
  - Job breakdowns
  - One point lessons

- Benefits:
  - Versatile
  - Serve as checklists when training is done
  - Document the standard work

- Challenge:
  - Maintenance of the library and completion of updates
## Creating Great Job Breakdown Sheets

<table>
<thead>
<tr>
<th>Important Steps</th>
<th>Key Points</th>
<th>Reasons for Key Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHAT to do</td>
<td>HOW to do it</td>
<td>WHY do it</td>
</tr>
</tbody>
</table>
| A logical segment of the operation when something happens to advance the work. | Anything in a step that might:  
1. Make or break the job  
2. Injure the worker  
3. Make the work easier to do (a trick of the trade; knack) | The logic or rationale that supports following the standard work – the “so what” factor |

### Creating a Job Breakdown

*A Job Breakdown outlines the things it is important for people to remember, in order to do work the one best way: standard work.*

<table>
<thead>
<tr>
<th>Important Step</th>
<th>Key Point</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advance the work</td>
<td>Key to doing the step correctly.</td>
<td>for key points</td>
</tr>
<tr>
<td>Select a process</td>
<td>Look at flow chart of the process.</td>
<td>Where are rework loops? Where is variation?</td>
</tr>
</tbody>
</table>
| With team, list important steps of this process | Write the meeting, not the 3-5 steps that move the work forward.  
- If more steps, define “phases” (more than one job breakdown) | Prevent rework. |
| With team, look for key points | Watch how a star performer does the job.  
- Look for key points: ask “why.” | Any more is too much to remember. |
| With team, look for key points | Watch how a star performer does the job.  
- Look for key points: ask “why.” | So everyone can be a star performer. |
| With team, look for key points | Check against the conference room list. | See if current documentation is accurate. |
| With team, look for key points | Check against the conference room list. | Create an outline that’s easy to remember and train. |
| Do the process yourself | Ask yourself what you did at each step.  
- Repeat, this time seeing if you have key points. | To ensure the job breakdown is complete:  
- Confirm important steps  
- Confirm key points |
| Do the process yourself | Ask yourself what you did at each step.  
- Repeat, this time seeing if you have key points. | To ensure it’s possible to train from  
- Job breakdown as support in  
- 4 steps of job instruction |
| Train someone new to the process | Explain purpose for Job Breakdown | To practice best training:  
- Job breakdown as support in  
- 4 steps of job instruction |
# A job breakdown for training

## Table: Important Material for Instruction

<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Notes for Key Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Practice</td>
<td>Determine how much skill, by whom</td>
</tr>
<tr>
<td>2</td>
<td>Prepare</td>
<td>Document important data as key points</td>
</tr>
<tr>
<td>3</td>
<td>Present</td>
<td>Prepare the right equipment, needed supplies</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note missing step as the section will be repeated to impact</td>
</tr>
</tbody>
</table>

## One Point Lesson

### Text:

1. Turn on the clock machine, press "load strip" and then press "start".
2. Then press with tapping the clock. You have 8 seconds before the machine is ready and each pull in force secondly and longer becomes reset.

### Table:

<table>
<thead>
<tr>
<th>Created by:</th>
<th>Date Created/Updated</th>
<th>Skill Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Knowledge</td>
<td>Improvement Example</td>
<td>Problem Example</td>
</tr>
<tr>
<td>Training Record</td>
<td>Table</td>
<td>Notes</td>
</tr>
</tbody>
</table>

### Diagram:

- **One Point Lessons**
  - Primary Care (Adults)
Using One Point Lessons

How to Create One Point Lessons
Let’s Try It!

Front Line Observation

- Overview
- Cadence
- “Go see. Ask why. Show respect.” Toyota Chairman Fujio Cho
- Humble inquiry
- In the Gemba
  - Three actuals:
    - Actual process
    - Actual place
    - Actual people
Leader Standard Work Boards

- Organizes and displays your checking plan in a calendar format
- Shows how well you are following through on your checking plan
- Reinforces improved processes – prevents slipping back to the old way
- Displays linked checking content, sequence & timing or cadence
- Also called “Kamishibai” boards in literature

Developing Leader Standard Work Boards
PAMF Leader Standard Work Board

Leader Standard Work Boards – Typical Components

- Each card describes where and what to check
- The check is binary (yes/no) and specifies what actions to take
- Flip card when the check is complete (always green)
- The leadership work is to offer an explanation when the card is red (meaning the check is not done)
Leader Standard Work board daily check

Leader Standard Work board daily check

3/6/2014

35

36
PAMF standard work board: check and follow up for daily huddles Urgent Care
PAMF Tier 1 (Department Board)

PAMF Tier 2 Checking Board
PAMF Tier 3 Checking Board

The key: red or green and visible
Gemba Walks Framework

**What is the purpose of a Workplace Rounding?**
- Audit standards and ensure they’re followed if not, why?
- Ensure accountability across teams and levels
- Deepen understanding both for leaders and workers alike of their work processes, defects and root causes.
- Build commitment, staff engagement and capability—leading change from the frontlines.
- Connect people & work to the larger picture: system, vertically and horizontally.
- Advance team to next level of lean thinking.
- Drive alignment to metrics to improve.
- Support daily accountability system.

**What is it?**
- Impromptu visit with the people doing the improvement work off the organization.
- Leader visits the workplace—never a conference room.

**How is it done?**
- Open-ended questioning.
- Active listening.
- Coaching and teaching.

**Key elements to gemba walks**

- **Rounding to check on leader standard work**
- **Regular cadence:**
  - Weekly
    - Standard calendar helps
- **Tiered metrics**
- **Visible problem solving**
- **Coaching by upper level leadership using questions (kata)**
Gemba Walk: What It Is

- 3 Actuals, operationalized
- Strategic examination & learning
- Shared learning opportunity with teams to understand how value flows
- Seeing how policies, organizational design and rules enable or interfere with flow
- Discovering how processes serve the customer
- Experiencing the emotional realities of what it means to engage with frontline teams

“Go see. Ask why. Show respect.”

Toyota Chairman Fujio Cho
Gemba Walk: What It Isn’t

- Auditing to find fault, blame
- “Drive by” public relations visit
- Spontaneous, free-flowing event
- Operational problem-solving
- Checking on managerial effectiveness
- Just a meeting

Gemba Walks
Let’s Try It!

It’s all about a change in perception
"What makes the desert beautiful," says the little prince, "is that somewhere it hides a well."

Lessons Learned and Reflections
Questions