

Supplies Necessary for Current State Assessment:

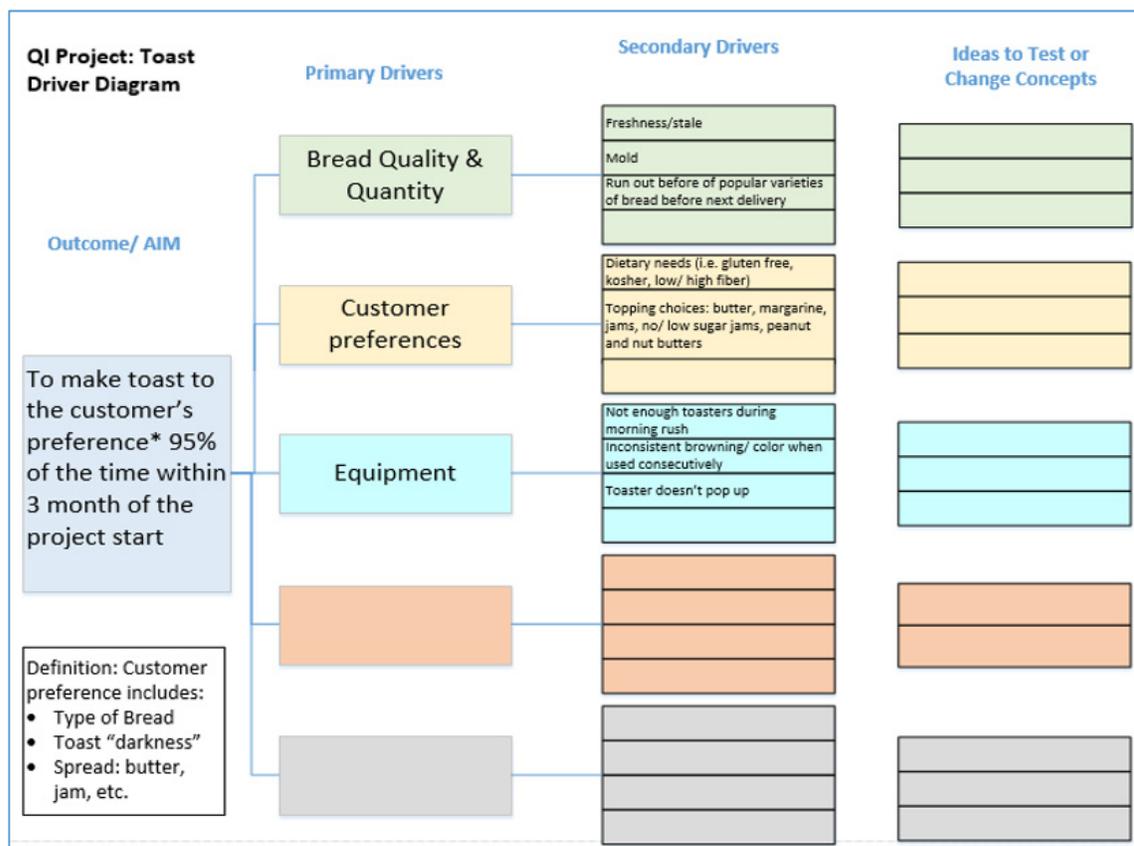
- Tent Cards (if you don't know the whole team)
- Long white paper x4 for initial state, target state and 2 extra sheets "just in case"
- Post-it Notes
 - Yellow - 1 pad/person attending + 2 extras
 - Purple - 1 pad/person
 - Blue - 1 pad
 - Pink - 1 pad
 - Light Green - 1 pad
- Flip Chart Markers
- Sharpies -Black and Colored
- Painters Tape
- Fishbone drawn out on long piece of white paper
- Impact/ Effort charts (one per chart/ category)
- Box of pens
- Camera (remember to have someone take pics of your team in action)

Facilitation Tips:

Have your "Reason for action," aim statement, and scope agreement with project sponsors before meeting with the team as a group.

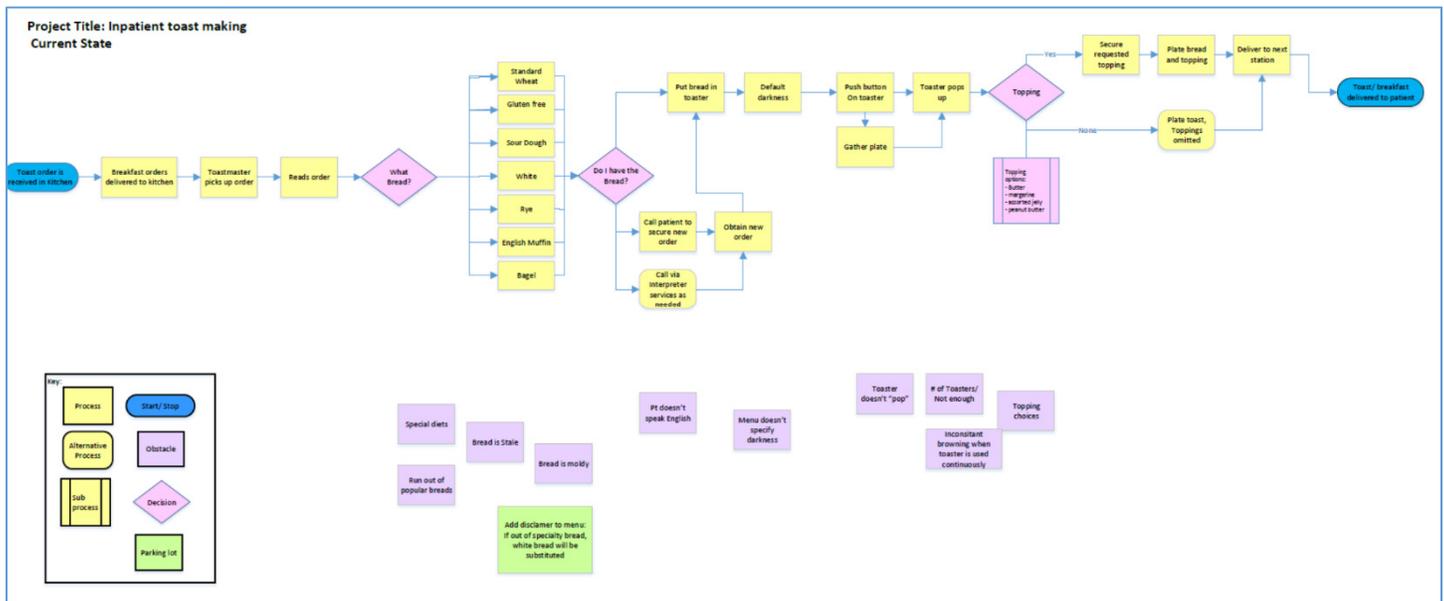
- Review the aim and scope with the team before you start the current state assessment to make sure the team members understand and agree.
- Understand and explain that adjustments may be necessary after you do the assessment.
- Be careful and avoid project creep! It is ok to work on a project in phases.

The Driver Diagram: A good tool to use when initially discussing a project idea with the various stakeholders; and a good tool to use for ongoing executive sponsor and stakeholder reporting.



Process Maps: A good tool to “see” the process. It helps multidisciplinary teams to understand each other’s roles. You first map the current state (process as it currently functions). You can then proceed to a future state process map, in which you map the ideal process your team hopes to achieve.

- Typically current state process mapping is done after the project aim and scope are decided. Process mapping can be done before a project starts to help understand where the obstacles are, and where to start/ how to scope the project.
- Make sure that there is representation from all groups that are involved in the process. It is best to include the people who are actually doing and/or “closest” to the process, not just the managers.
- “Parking lot” any solutions that come up when creating the current state map, so that you do not lose the good idea.
- If possible, go and watch the current state and map as the process is happening. This is also called a Gemba walk.
- When mapping the future state, don’t get bogged down on “how” you will get to the future; it is the time to dream what could become of the future were there no barriers or obstacles.

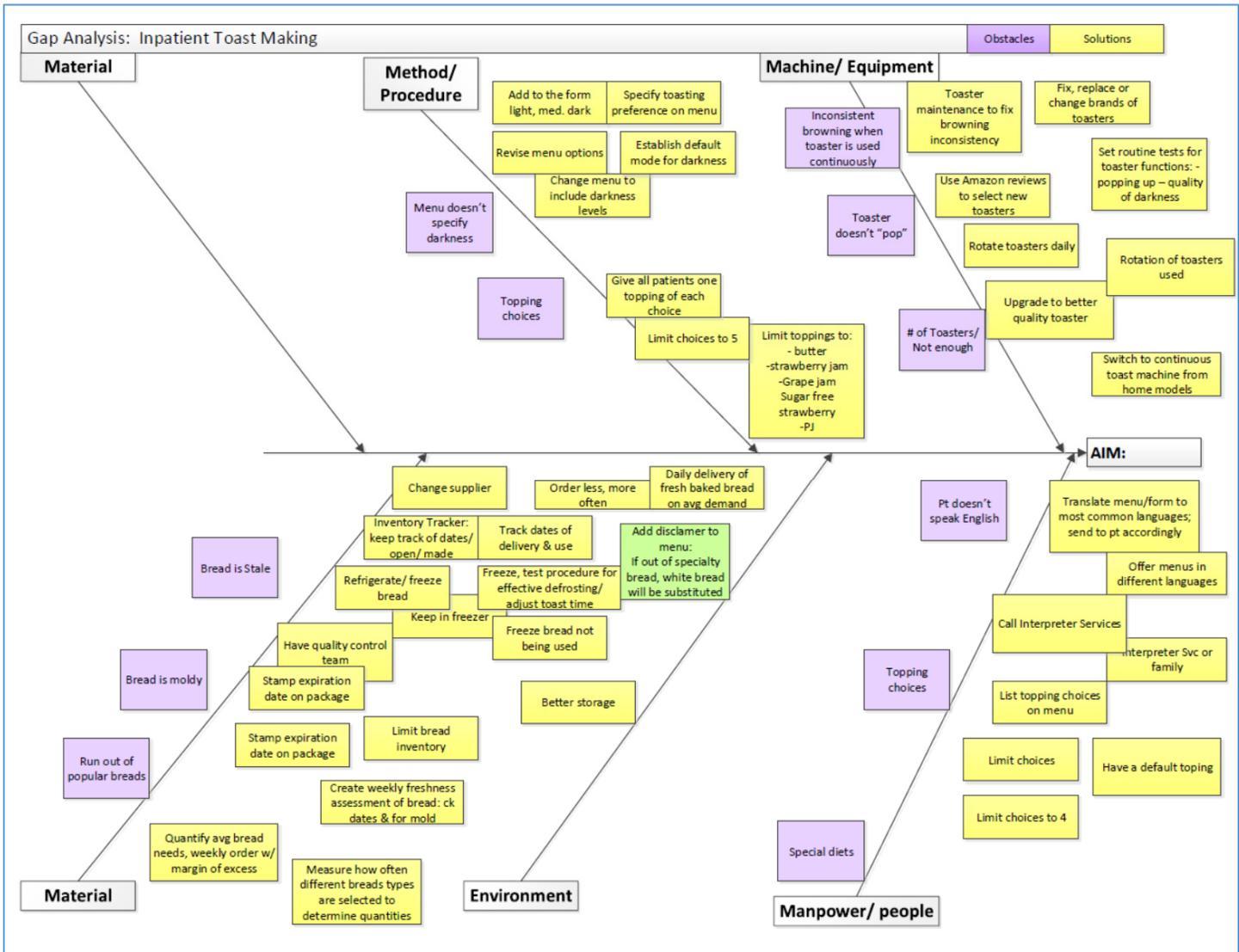
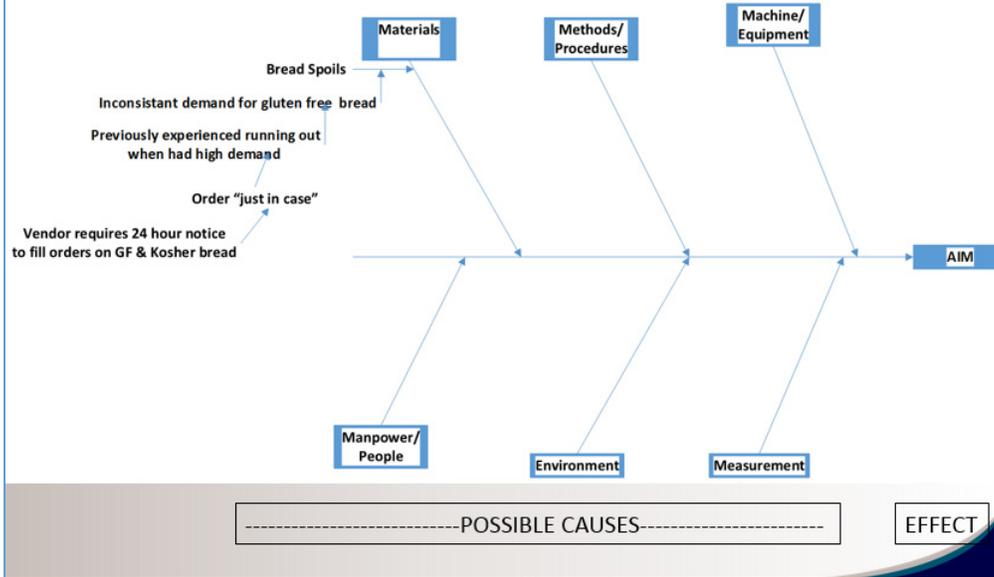


Fishbone: Also called a “Cause and Effect” diagram, this tool helps you identify and categorize the potential causes contributing to your problem/outcome.

- Start with the 5M categories and customize as needed for your project.
- Place all the obstacles, by category, on the left side of each “spine.”
- Each team member gets their own post it notes to brainstorm by individual obstacle or by category. This helps to minimize any possible power structures of positions on the team.
- Obstacles can be further detailed by using the “Five Whys” technique – to help you drill down on root causes of a given issue. These sub-causes can be listed as additional branches coming off your fishbone (see first example below).
- You may also use your fishbone diagram with barriers mapped for a first pass at solution identification (as in the making toast example below).

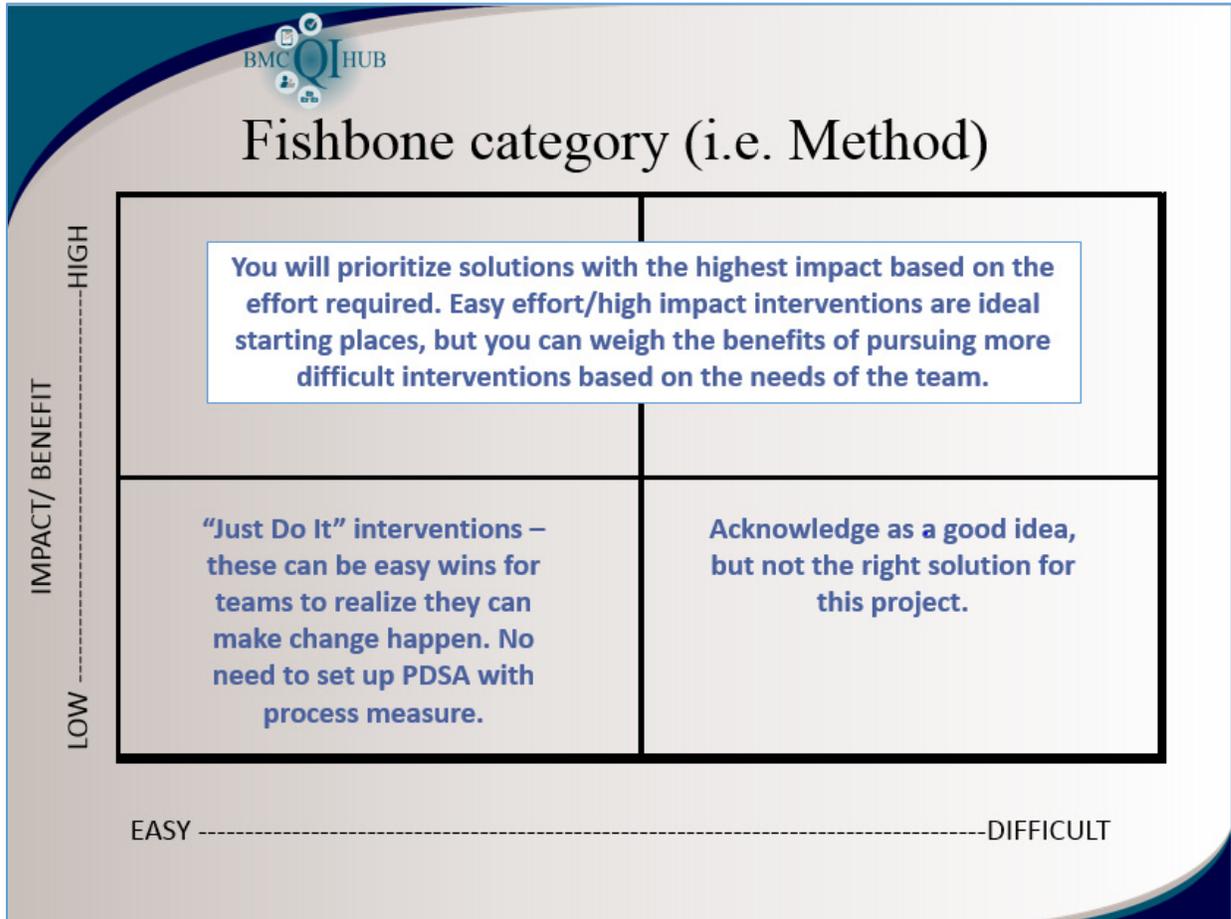
Asking 5 Why's

Project Title: Customer Toast
Cause and Effect Diagram



Impact/ Effort Matrix: A tool to narrow down the solutions based on the anticipated ease of implementing them and the overall impact. This tool can help you prioritize the interventions that you will test in your first PDSAs.

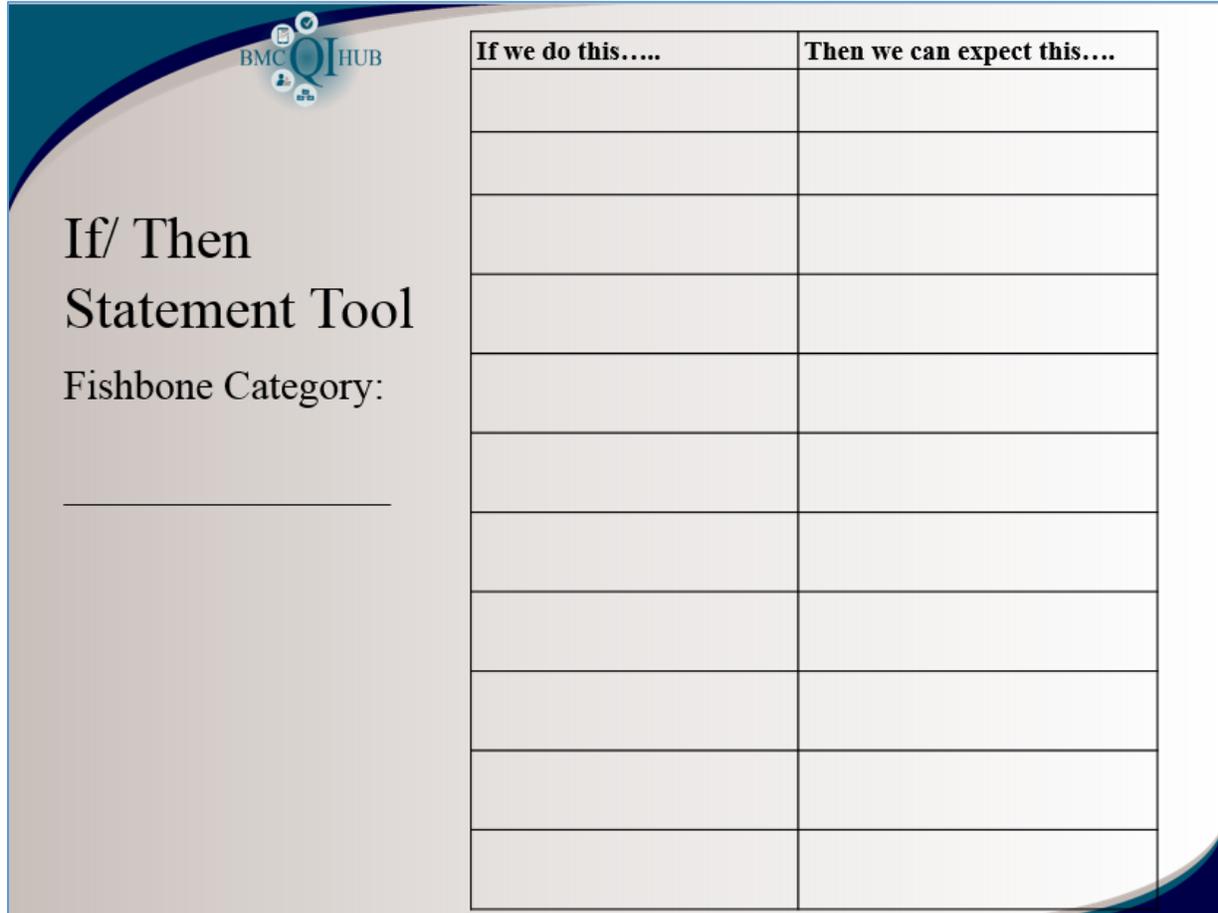
- It is ok to group similar solutions into one.
- Effort Definitions:
 - Easy = anyone in the room can implement the change within 72 hours without additional resource
 - Difficult = requires VP or Sr. Level management approval and likely to take > 6 months
- Impact Definitions:
 - Low/High impact refers to the impact to the aim (remind team the impact to AIM, not their roles, other duties and responsibilities).



If/Then Tool: “If we do ... (this solution)/ Then we will... (get improve/ get this outcome).”

Once you have plotted your ideas for interventions, this is a technique you can use to select which ones you would like to test first. This step translates the “post-it” sized idea into an elevator speech.

- You should now have your solutions narrowed down to about a dozen ideas.
- If you have a large team, and more than one representative for each discipline, split into two groups, each covering ½ for the categories.



BMC QI HUB

If/ Then Statement Tool

Fishbone Category:

| If we do this..... | Then we can expect this.... |
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Rank Order Voting

Each member of the team ranks from 1 to number of solutions, with 1 being the top choice. This technique helps to minimize any possible power structures of positions on the team. There will most likely be 1-2 ideas that are every ones “top choices”, and 4-6 ideas that are worth testing.

| | Choice 1 | Choice 2 | Choice 3 |
|-----------------------|----------|----------|----------|
| Intervention Option 1 | | | |
| Intervention Option 2 | | | |
| Intervention Option 3 | | | |