

| | Step | Purpose | Procedures | Tools | Outcomes |
|------|---------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PLAN | 1. Identify a product or service for improvement | Identify a product (e.g. documentation of discharge instructions) or service/ care process/workflow for improvement. | <ul style="list-style-type: none"> Identify team Describe service or product for improvement | <ul style="list-style-type: none"> Brainstorming/ Nominal Group Technique Multi-voting Statistical tools¹ | <ul style="list-style-type: none"> Name of product or service Team established Begin story or huddle board |
| | 2. Identify your customers and their expectations | Understand customer requirements and what is needed to meet or exceed them. | <ul style="list-style-type: none"> Identify customers and their expectations Collect data on how well needs are currently being met (baseline) | <ul style="list-style-type: none"> Flowchart Checksheet | <ul style="list-style-type: none"> List of customers List of customer expectations Add to story or huddle board |
| | 3. Describe current work process | Understand the current process to produce the product or service. | <ul style="list-style-type: none"> Create flowchart of current process | <ul style="list-style-type: none"> Flowchart | <ul style="list-style-type: none"> Flowchart of current process Add to story or huddle board |
| | 4. Identify improvement opportunities | Select the focus of improvement (beginning and end points). | <ul style="list-style-type: none"> Identify existing process complexity Use existing data to understand scope of complexity Prioritize improvement opportunities Select opportunity of greatest concern | <ul style="list-style-type: none"> Flowchart Process map Multi-voting Checksheet Statistical tools | <ul style="list-style-type: none"> Prioritized list of improvement opportunities Agreement on which opportunity to pursue Add to story or huddle board |
| | 5. Establish and verify cause and effect | Ensure identification of the “root cause” before the process is changed. | <ul style="list-style-type: none"> Analyze “root cause” of selected opportunity Gather data to ensure proper opportunity has been identified | <ul style="list-style-type: none"> 5 Why's Brainstorming Fishbone Diagram Data Scatter Diagram | <ul style="list-style-type: none"> The “causes” to be tackled first |
| | 6. Revise the work process | Develop a plan to improve and monitor the process. | <ul style="list-style-type: none"> Develop plan to streamline, shorten, simplify, or otherwise improve process | <ul style="list-style-type: none"> Brainstorming Multi-voting Flowchart Process Map | <ul style="list-style-type: none"> Flowchart of revised process Add to story or huddle board |
| DO | 7. Conduct a small test of the revised process | Test the process change on a small scale before implementing throughout the systems. | <ul style="list-style-type: none"> Design a small scale (e.g., one day, one shift, one patient) test of change Run revised process according to test plan Collect data on new process | <ul style="list-style-type: none"> Flowchart Checksheet Run Chart Scatter diagram | <ul style="list-style-type: none"> Data on impact of process revision Add to story or huddle board |

¹ Statistical tools include Pareto Chart, Scatter Diagram, Run and Control Charts and Histograms

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| STUDY | 8. Evaluate the results | Determine whether the revised process delivers product/service that meets customer requirements. Look for unintended results of the change. If more changes needed, go back to Step 5. | <ul style="list-style-type: none"> Confirm effects of process change, check if root cause has been mitigated, any unintended consequences? Compare the problem before and after using the same indicators Go to back to PLAN if results are not satisfactory | <ul style="list-style-type: none"> Stratify with Statistical tools | <ul style="list-style-type: none"> Analyze results of test of change Recommendation(s) on how to proceed Add to story or huddle board |
| ACT | 9. Standardize and implement the improved process | Implement the improved process widely. | <ul style="list-style-type: none"> Conduct training on new process Communicate improvement procedure and results Gather data and continuously monitor process to maintain improvement Implement sustainability procedures to maintain gains | <ul style="list-style-type: none"> Flowchart Checksheet Pareto Chart Fishbone Diagram | <ul style="list-style-type: none"> Documentation of procedure and results Add to story or huddle board |
| | 10. Measure and analyze customer satisfaction | Establish ongoing feedback about improved product or service with customers. | <ul style="list-style-type: none"> Develop mechanism to seek information on customer recommendations | <ul style="list-style-type: none"> Brainstorming Flowchart Process Map Pareto Chart Fishbone Diagram | <ul style="list-style-type: none"> Process for collecting customer data Add to story or huddle board |
| | 11. Share and celebrate your story! | Encourage identification of and initiation of future improvements. | <ul style="list-style-type: none"> Record team information Communicate quality story at all levels Recognize contributors Plan future improvements | <ul style="list-style-type: none"> Story or Huddle board | <ul style="list-style-type: none"> Share with others Plan for continuous improvement Celebration |