<table>
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<tr>
<th>Step</th>
<th>Purpose</th>
<th>Procedures</th>
<th>Tools</th>
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</table>
| 1. Identify a product or service for improvement | Identify a product (e.g. documentation of discharge instructions) or service/process/workflow for improvement. | o Identify team  
 o Describe service or product for improvement | o Brainstorming/Nominal Group Technique  
 o Multi-voting  
 o Statistical tools | o Name of product or service  
 o Team established  
 o Begin story or huddle board |
| 2. Identify your customers and their expectations | Understand customer requirements and what is needed to meet or exceed them. | o Identify customers and their expectations  
 o Collect data on how well needs are currently being met (baseline) | o Flowchart  
 o Checksheet | o List of customers  
 o List of customer expectations  
 o Add to story or huddle board |
| 3. Describe current work process | Understand the current process to produce the product or service. | o Create flowchart of current process | o Flowchart | o Flowchart of current process  
 o Add to story or huddle board |
| 4. Identify improvement opportunities | Select the focus of improvement (beginning and end points). | o Identify existing process complexity  
 o Use existing data to understand scope of complexity  
 o Prioritize improvement opportunities  
 o Select opportunity of greatest concern | o 5 Why's  
 o Brainstorming  
 o Fishbone Diagram  
 o Data  
 o Scatter Diagram | o Prioritized list of improvement opportunities  
 o Agreement on which opportunity to pursue  
 o Add to story or huddle board |
| 5. Establish and verify cause and effect | Ensure identification of the “root cause” before the process is changed. | o Analyze “root cause” of selected opportunity  
 o Gather data to ensure proper opportunity has been identified | o Brainstorming  
 o Multi-voting  
 o Checksheet  
 o Statistical tools | o The “causes” to be tackled first |
| 6. Revise the work process | Develop a plan to improve and monitor the process. | o Develop plan to streamline, shorten, simplify, or otherwise improve process | o Brainstorming  
 o Multi-voting  
 o Flowchart  
 o Process Map | o Flowchart of revised process  
 o Add to story or huddle board |
| 7. Conduct a small test of the revised process | Test the process change on a small scale before implementing throughout the systems. | o Design a small scale (e.g., one day, one shift, one patient) test of change  
 o Run revised process according to test plan  
 o Collect data on new process | o Flowchart  
 o Checksheet  
 o Run Chart  
 o Scatter diagram | o Data on impact of process revision  
 o Add to story or huddle board |

1 Statistical tools include Pareto Chart, Scatter Diagram, Run and Control Charts and Histograms
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<td>8.</td>
<td>Evaluate the results</td>
<td>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.</td>
<td>o Confirm effects of process change, check if root cause has been mitigated, any unintended consequences?  o Compare the problem before and after using the same indicators  o Go to back to PLAN if results are not satisfactory</td>
<td>o Stratify with Statistical tools</td>
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| 9. | Standardize and implement the improved process | Implement the improved process widely. | o Conduct training on new process procedure and results  o Gather data and continuously monitor process to maintain improvement  o Implement sustainability procedures to maintain gains | o Flowchart  o Checksheet  o Pareto Chart  o Fishbone Diagram | o Documentation of procedure and results  o Add to story or huddle board |

| 10. | Measure and analyze customer satisfaction | Establish ongoing feedback about improved product or service with customers. | o Develop mechanism to seek information on customer recommendations | o Brainstorming  o Flowchart  o Process Map  o Pareto Chart  o Fishbone Diagram | o Process for collecting customer data  o Add to story or huddle board |

| 11. | Share and celebrate your story! | Encourage identification of and initiation of future improvements. | o Record team information  o Communicate quality story at all levels  o Recognize contributors  o Plan future improvements | o Story or Huddle board | o Share with others  o Plan for continuous improvement  o Celebration |