CHANGE MANAGEMENT IN PRIMARY CARE TRANSFORMATION

FOUR STRATEGIES FOR MANAGING THE PEOPLE SIDE OF CHANGE

WENDY JAMESON, CONSULTANT, COACH & TRAINER
WE'RE HIRING A DIRECTOR OF CHANGE MANAGEMENT TO HELP EMPLOYEES EMBRACE STRATEGIC CHANGES.

OR WE COULD COME UP WITH STRATEGIES THAT MAKE SENSE, THEN EMPLOYEES WOULD EMBRACE CHANGE.

THAT SOUNDS HARDER.
TAKE HOME MESSAGE FOR TODAY...

- Your people are the secret to organizational transformation.

- Changing ourselves, as leaders, is the first step to creating an environment in which the people in your organization feel empowered & motivated to create real and lasting change.
Executive closed-door session...

Problem defined as:

“Patient experience data not always available when needed.”
Mismanaging change → Staff Confusion

- What are the priorities?
- What is the problem?
- How will this change fix the problem?
- Do people think we’re doing a poor job?
Mismanaging change →
Feelings of being:

- Overworked
- Under-appreciated
- Ignored
In summary: How did this executive team mismanage change?

- Talked only among themselves
- Defined the problem vaguely without looking for root causes
- Identified solution prematurely
- Kept those most affected by the change in the dark
- Did not ask for input from people closest to the issue or with most knowledge
- Communicated solution across the organization before communicating with those most affected
Leadership Behaviors: How to Manage Change & Unleash the Power of Your People

1. Relentlessly define the problem
2. Partner with front-line staff & patients to ID high-impact solutions
3. Prioritize & sequence change initiatives
4. Communicate frequently and transparently
CHANGE MANAGEMENT DEFINED

Change is persuading massive #s of people to stop doing what they have been doing, and start doing something that they probably don’t want to do. (author unknown)

Change management is the discipline that guides how we prepare, equip and support individuals to successfully adopt change in order to drive organizational success and outcomes. (www.PROSCI.com)
CHANGE FATIGUE EATS ORGANIZATIONAL TRANSFORMATION FOR LUNCH, BREAKFAST AND DINNER
“Suspending your keyboard from the ceiling forces you to sit up straight, thus reducing fatigue.”
How to spot Change Fatigue among staff:

- Disengaged
- Frustrated
- Fatigued
- Resistant
- Confused
- Cynical
We Must Nip Change Fatigue in the Bud Because It:

- Slows change efforts
- Changes won’t stick
- Drains morale
- Symptom/cause of staff dissatisfaction
- Biggest barrier to organizational transformation
Leadership Behavior #1: RELENTLESSLY DEFINE THE PROBLEM

BE A PROBLEM DETECTIVE AND COACH OTHERS TO SEARCH FOR THE TRUE PROBLEM, ALL THE WAY TO ITS ROOT CAUSES

➢ THAT WILL LEAD TO REAL SOLUTIONS
The Costs of Not Defining the Problem

- Wasted time and resources from working on wrong problem
- Reduced motivation to fix the real problem
- Negative impact from the original, ongoing problem
How executives & managers can help define the problem...

- Get perspectives of front-line staff closest to the issue, & patients
- Observe the process
- Use tools like Fishbone diagram, process mapping, 5 Whys
Questions executives & managers should continuously ask

- What is the problem we are trying to solve?
- What does it look like now?
- What would it look like if it were working well?
Use tools for defining the problem with front line staff and patient perspectives
Leadership Behavior #2: PARTNER WITH FRONT LINE STAFF AND PATIENTS TO ID HIGH-ImpACT SOLUTIONS
Identify *Vital Behaviors*

--Joseph Grenny, Kerry Patterson, et al, *Influencers*

PARETO PRINCIPLE (AKA, THE 80-20 RULE): FOR MANY PROBLEMS, 80% OF THE EFFECT COMES FROM 20% OF THE CAUSES.
Finding Solutions With The Biggest Impact

How one man saved millions of lives by identifying “vital behaviors” & stopping rampant spread of AIDS in Thailand.

Dr. Wiwat Rojanapithayakorn, World Health Organization, Mongolia
Formerly Minister of Health, Thailand
ID & Spread a Vital Behavior:

Whether sex workers request that clients use condoms
YOUR TURN...What are some potential vital behaviors in primary care transformation?

**PROBLEM:** Patient not taking medication correctly, leading to poor outcomes

**Potential Vital Behavior:**
- Medication reconciliation, including best practices like “closing the loop” so patient demonstrates understanding of how to take meds

**PROBLEM:** Diagnostic reports from specialist are not available at the next primary care visit

**Potential Vital Behavior:** *PLEASE SHARE YOUR IDEAS THROUGH THE CHAT BOX*

**PROBLEM:** Meetings conclude with participants unclear of action plan or what was decided at the last meeting

**Potential Vital Behavior:** *PLEASE SHARE YOUR IDEAS THROUGH THE CHAT BOX*
ID & test solutions: Questions executives & managers should continuously ask

- What ideas do you have for a change that could help us get there?

- How could we try out that idea on a small scale, and what do you think will happen?

- What are our next steps: who is going to try it, when, and how?
Leadership Behavior #3: PRIORITIZE & SEQUENCE CHANGE INITIATIVES

Decide what change initiatives your organization can postpone or not do at all, so that you can work on what’s most important now.
Leaders tend to pile on multiple change initiatives without asking:

- Is this essential to meeting our strategic priorities?
- Is it critical to take on now?
- How can we create capacity to take this on? E.g., integrate it with current effort, or stop/postpone current change effort?
“A well-paced marathon can easily become 26 one-mile sprints—leading to exhausted and burnt out employees.”

---Ken Perlman, Kotter International
Denver Health effectively uses Lean as a change management system to:

- Prioritize & sequence change initiatives
- Hold teams accountable for progress
FIRST STEP TO PRIORITIZE CHANGE INITIATIVES:

Scan your organization to identify ALL current change efforts
### Inventory of Change Initiatives

**PURPOSE:** One of the most critical change management strategies is to prioritize only the most important change initiatives and support those with adequate staff, attention and resources. The Inventory of Change Initiatives is a tool to catalog the existing improvement efforts in your organization. With this clear picture of what is already happening on the ground, leadership teams can make informed decisions in considering new change initiatives. The completed tool helps leadership: 1) gauge if there is bandwidth to take on new change initiatives; 2) highlight what staff/departments are most involved in change initiatives, and reveal opportunities to integrate new improvement work with existing efforts.

<table>
<thead>
<tr>
<th>Name of Change Initiative</th>
<th>Initiative A</th>
<th>Initiative B</th>
<th>Initiative C</th>
<th>Initiative D</th>
<th>(Continue...)</th>
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<tbody>
<tr>
<td>Initiative Lead</td>
<td>V. Ramos, Chair Process Redesign Committee</td>
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<tr>
<td>Aim of the Initiative</td>
<td>Improve likelihood of patients completing referral appointment from 25% to 75%</td>
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<td>Impacted Groups</td>
<td>Referral Coordination, Providers, Outside Specialist office staff</td>
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<td>Strategic Alignment</td>
<td>Yes under “Enhance Coordination”</td>
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<td>Stage</td>
<td>Planning</td>
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<td>Expected Date of Completion</td>
<td>7/31/2016</td>
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<tr>
<td>Impact to Date</td>
<td>None yet, modest impact, high impact</td>
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<tr>
<td>Level of effort involved</td>
<td>Medium effort</td>
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See Tab 2 for instructions

Developed by Wendy J. Johnson, Consultant, under contract with the California Primary Care Association.
How to Use Your Completed Change Initiative Inventory

When considering new improvement initiatives, you should ask 3 questions:

1. Is this new change initiative **essential** to meeting our strategic priorities?
2. Is it critical to take on **now**?
3. How can we **create capacity** to take this on? **Review your Change Initiative Inventory** to determine opportunities to:
   - Integrated into an existing initiative
   - Wrap up current initiative before starting a new one
   - Stop or delay current initiative
   - Postpone launching the new initiative until there is sufficient capacity
Leadership Behavior #4: COMMUNICATE FREQUENTLY & TRANSPARENTLY

DON’T LEAVE YOUR STAFF IN THE DARK
COMMUNICATE:

What changes are being worked on & why

Potential impact on people & on other areas needing improvement

Leadership support for the change process
TRY THESE LEADERSHIP BEHAVIORS AS YOU MANAGE THE CHANGES AHEAD:

1. Relentlessly define the problem
2. Partner with front-line staff & patients to ID high-impact solutions
3. Prioritize & sequence change initiatives
4. Communicate frequently and transparently

IN CONCLUSION…
QUESTIONS?

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