Methods for Developing Fundamental Change

PROCESS FLOW MAPPING
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“Go and See” Site Visits

- “Go and See” where work is done
- Tell the people at the site what to expect (e.g. that they should show processes instead of tell, etc.)
- Ask open ended questions, listen
- Show respect: Approach from a place of mutual interest in making processes better for staff and patients
- Debrief & record in your notes:
  - Anything you want to remember
  - Problems to solve
  - Tasks that need to be completed

8 Steps in Gemba Walk

1. Identify the purpose for the Gemba Walk
2. Ensure you understand the process you are about to observe
3. Select a time you will be observing
4. Observe where value is created, where the work is done
5. Observe the processes and quality of service provided (inputs and social interactions)
6. Recognize how the process performs in its current state
7. Visualize the gap between the ideal state and what actually happens
8. Look for opportunities for improvement (close the gap between actual and ideal)

Gemba walks are approached from a place of mutual respect and interest in making processes faster, safer, easier and just plain better.
Sample Worksheet:
Site Visit Observation Notes

Site Visit Team Members: _________________________________  Date: ____________________

Site: ______________________________  Process Observed: __________________________

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<tr>
<th>Start Time/End Time</th>
<th>Step Name</th>
<th>Role Responsible</th>
<th>Opportunities Observed</th>
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Potential Opportunity Areas

- Confusion
- Motion
- Waiting / Delay
- Overprocessing
- Inventory
- Process Failure
- Overproduction
Think about an experience . . .

- Frustrated/irritated
- Excited/surprised
Change vs. Improvement

“All improvement requires change, but not every change is an improvement.”

The improvement Guide, Langley, etal., Chapter 6, p. 109
Who will benefit from our change?
Typical Solutions in Developing Change

More of the Same
- People
- Money
- Time
- Exhortations to work harder

Inspection
- Doesn’t alter the way the work is accomplished

Utopia Syndrome
- The search for perfection
  - Action paralysis
  - Motivated by fear of failure
Change

• The process or result of making or becoming different
• “Different” is not the same as “improvement”
Reactive vs. Fundamental Change

Reactive (First Order Changes)
• Routinely made to solve immediate problems
• Keeps system running at the current level of performance
• Returns system to prior condition
• Immediate/short-term impact

Fundamental Changes (Second Order Changes)
• Creates new system of performance
• Designs/re-designs some aspect of the system
• Fundamentally alters the system
• Long-term impact
Methods for Developing Fundamental Change

1. Logical thinking about the current system
2. Benchmarking or learning from others
3. Using technology
4. Creative thinking
5. Using change concepts

Logical Thinking About the Current System

• Assessing "current" state
Peanut Butter and Jelly

WRITE DOWN THE STEPS TO PREPARE A PEANUT BUTTER AND JELLY SANDWICH
What did we learn from this activity?
What is a Process?

From Dictionary.com:
• “A systematic series of actions directed to some end.”
• “A continuous action, operation, or series of changes taking place in a definite manner.”
What is Process Flow Mapping?

• Visual representation of a process or work flow
• Depicts each step sequentially
• Source for understanding what needs to be improved
Developing a Process Flow Map

1. **Identify**
   - Identify areas for improvement

2. **Analyze**
   - Analyze for accuracy and completeness

3. **Develop**
   - Develop a detailed process flow map of the **ACTUAL** process (not as it should be)

4. **Create**
   - Create a high-level process (Less than 10 steps)

5. **Gather**
   - Gather the subject matter experts

Gather the subject matter experts and gather the high-level process. Develop a detailed process flow map of the **ACTUAL** process, then analyze for accuracy and completeness. Finally, create a high-level process and identify areas for improvement.
Gather Subject Matter Experts

- Representatives who will provide firsthand accounts of how the process REALLY works
Process Flow Mapping:
Begin with High-level Process

Shop for ingredients
Gather ingredients and supplies
Assemble sandwich
Mapping the Detail
Walk into kitchen

Gather ingredients (peanut butter, jelly, and bread)

Gather utensils (plate, knife, and spoon)

Remove twisty tie or plastic cinch from plastic bread

Remove two slices of bread from the package (skip the heel)

Twist and remove lids from peanut butter and jelly jars

Is there an inside seal on the jar?

Yes

Remove the seal and dispose of same

No

Scoop out peanut butter onto the blade of knife

Dip knife into peanut butter

Does peanut butter cover face of bread slice?

Yes

Spread peanut butter on the face of one slice of bread

Dip knife into jelly

Scoop jelly onto the blade of the knife

Does jelly cover face of bread slice?

Yes

Spread jelly on the face of the remaining plain one slice of bread

No

Lay the two slices of bread face up, and side-by-side

Lift bread slice w/peanut butter using two hands, fingers on edges

Lift bread slice w/peanut butter using two hands, fingers on edges

Rest blade of knife on edge of plate w/handle on counter

Rest blade of knife on edge of plate w/handle on counter

Does jelly cover face of bread slice?

Yes

Mentally plan alignment of bread pattern shapes

Flip slice bread with peanut butter onto slice of bread with jelly (peanut butter facing jelly)

Do you want to cut crusts off?

Yes

Carefully use knife to remove crusts of bread on all four sides of the sandwich

No

Use blade to cut sandwich on diagonal, forming two triangles

Use blade to cut sandwich on diagonal, forming two triangles

Pick up the knife by the handle

Cut sandwich in \( \frac{1}{2} \)\?

Yes

Enjoy sandwich!

No

Pick up the knife by the handle

Pick up the knife by the handle

Cut sandwich in \( \frac{1}{2} \)?
Process Mapping Symbols

- **Start and End**: Oval used to show inputs (materials, information or action) that starts a process and outputs (the results) at the end of a process.

- **Activity**: Rectangle represents one task/activity/step in the process.

- **Decision**: Diamond represents a decision point in the process.

- **Break**: A circle identifies a break in the process.
Stick Notes are a Process Flow Mapper’s Best Friend!
Process Flow Map – High Level
ED Admission to Hospital Bed

- Physician signs admission orders
- Bed is assigned
- ED RN hands-off to hospital unit RN
- Patient transported from ED to hospital bed
- Patient in hospital bed
Process Flow Map – Detailed
ED Admission to Hospital Bed
Think About Your Upcoming Site Visit

• **What process/systems would you like to observe?**
  - What are you “wondering” about?
  - What is your “gut” feeling about where the problems in your system lie?
  - What parts of the process do you “think” can be improved?
  - Make some predictions about what you think you will see
Develop a “Current State” Process Flow Map

- Develop a Process Flow Map
- Select a process that you would like to observe during your site visit
- Identify the high-level steps first
- Develop detailed steps/decision points
  - Use post-its and blank chart pad on the wall
  - If you don’t REALLY know because experts are not at the table, use your best guess
Next Steps

• If possible, gather the experts and repeat this activity
  • How did the experts’ version of “current state” differ from your own?
• Use the “current state” process flow map to identify:
  • Differences in what you *THOUGHT* current state was and what *REALLY* is
  • Who the system benefits (is the patient at the center of this process?)
  • Critical steps (what *must* occur to get the desired outcome)
  • Differences in sequencing and/or style, e.g., how does the process vary when someone different performs the activity/task (how does it impact the desired outcome?)
  • Bottlenecks (sometimes found at points of decision), waste, redundancies, and work-arounds