10 Essentials of Successful, Rapid Change Management in the Lab

Presented by Jim Ellis & Leo Serrano
Lab Quality Confab
New Orleans
3rd Day Workshop – October 23rd, 2014
Robert Michel,
Opening Remarks
James (Jim) E. Ellis – BS & MS (the Ohio State University), MBA (Bryant University), MBB (certified Master Black Belt, lean & 6 Sigma, Johnson & Johnson)

Recently retired from Ortho Clinical Diagnostics/Johnson & Johnson and Ciba Corning Diagnostics (Novartis). Over 40 years experience in sales, marketing, mfg., product development and R&D in clinical diagnostics. Holder of 3 patents in immunology and clinical automation. Certified Miller/Heiman Large Account Management Process (LAMP) Instructor. Author of Multiple White Papers, Publications, Abstracts, Presentations. Was a pioneer in the early introduction of lean and 6 sigma into laboratories in late 1990’s. Speaker will share experiences from years of conducting successful, rapid change management projects in various lab, research and mfg. environments.

Currently, Jim is a managing partner at MME Consulting, LLC. He and his wife, Margaret, live in Aiken, SC, and are enjoying semi-retirement with enough consulting work to keep them still engaged in healthcare.
Example:
Change Management Project

Successful?
Rapid?
Change?
Management?

Was the “Customer” really more satisfied after the change?

Change management is the application of a structured process and set of tools for leading the people side of change to achieve a desired outcome.

When change management is done well, people feel engaged in the change process and work collectively towards a common objective, realizing benefits and delivering results. (PROSCI)
Title of Workshop – the words - We have chosen the words to the title of this workshop with purpose:

• **Successful** – in the eyes of your customer, adds value, operational definition, what would success look like, how would you measure it & know when it is achieved?

• **Rapid** – 1st project 30 days or less, majority 90 days or less, max. 12 months

• **Change** – operational definition, measurement before & after, and time bound

• **Management** = Leadership, YOU!

Apply the 10 essentials in the order presented and you have a very high probability of success. Start small. Steep learning curve. Practice makes perfect. Let’s get started!
Purpose of Workshop:

We have titled this workshop, “10 Essentials of Successful, Rapid Change Management in the Lab”. The purpose will be to impart to the workshop attendees a process for successful, rapid change management in the lab that has been evolved and used successfully by the two speakers throughout their careers.

Key Learnings:

At the end of the workshop we would expect the attendees to have learned that there is a methodical, sequential process broken into 10 essential steps that when mastered will produce successful, rapid change management results. The attendees have the opportunity to learn about specific tools that can be used in each of the 10 steps which when applied will accelerate the time to do a change management project and will increase the probability of success. Below is a listing of some of the tools that will be presented and described:

- 4 Stages of Competence
- 5 Styles of Thinking
- VOC
- CTQ Tree
- Gantt Chart
- DMAIC Roadmap
- Data Collection Plan
- PIP
- Job Jar
- Ho-Hum Crasher
- Impact vs. Effort Diagram
- 5 Why’s
- 5 S
- SIPOC
- Value Stream Map
- Kano
- FMEA
- Prioritization Matrix

The hidden secrets to putting all these tools to work in a specific sequence to tell a “story” of success will be the greatest learning shared with the attendees.
At the end of the workshop attendees will………………………………

...understand the process developed over many years for conducting successful, rapid change management projects in the lab
...understand what the 10 Essentials are to successful, rapid change management in the lab
...understand what sequence to apply the 10 Essentials & what tools are best used in each of the 10 steps
...have a tutorial containing written summaries of the process along with the slides used
...have a list of appropriate references specific to each of the 10 steps
...have contact information to reach out to both speakers
At the end of today’s Workshop you will know how to do this & what each line, color, section and number means as you progress through the “10 Essentials of Successful, Rapid Change Management in the Lab”
Agenda – 10 Essentials of Successful, Rapid Change Management in the Lab:

1. *Learning to “Think”
2. *Learning to “See” the Opportunities
3. Prioritize the Opportunities – Make your Shortlist in Priority Order
4. Define Success for each Change (measure of Success, time frame, value
5. Pick your team (Stakeholders, Team Captain, Players)
6. Gantt your time line for the complete project (all steps of DMAIC)

LUNCH

7. *Learning to “Execute” your plan (detail out all steps of DMAIC)
8. Create a “Job Jar” of Future Changes as you go along but stay focused on current change
9. Presentation/s to Stakeholders, Customers, Team (possible PIP use)
10. *Learning to “Count”

Summary of Workshop & Closing Remarks
Interactive Session with Q&A – if we have time we can work on some of your projects.
1. **Learning to “Think”**

- R&R
- Ready & Receptive
- Ready to embark on change
- Receptive to accepting “I don’t know what I don’t know.
- Receptive to take on a leadership role in initiating successful, rapid change within your laboratory and institution.
1. Learning to “Think”

The First Tool in this section helps get at “Thinking”

Uncover the “Styles” of thinking that are predominant in a Western business culture. You can read all about this in detail by going to the book “The Art of Thinking” by A. Harrison & R. Bramson

Exercise on Styles of Thinking
Your Question*:

For me, charts and graphs in a book or article are usually:

1. More useful than the narrative, if they are accurate.
2. Useful, if they clearly display the important facts.
3. Useful, if supported and explained by the narrative.
4. Useful, if they raise questions about the narrative.
5. No more and no less useful than other material.

Circle one answer that is most like what you think.

*(Pg 209, “The Art of Thinking”, A.F. Harrison & R.M. Bramson)
1. Learning to “Think”

5 Thinking Styles*:

1. Synthesist
2. Idealist
3. Pragmatist
4. Analyst
5. Realist

* (“The Art of Thinking”, A.F. Harrison & R.M. Bramson)
## 5 Styles of Thinking

<table>
<thead>
<tr>
<th>Orientation:</th>
<th>Characterized by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>SYNTHESIST</td>
<td>Assimilative or holistic view</td>
</tr>
<tr>
<td></td>
<td>Broad range of views welcomed</td>
</tr>
<tr>
<td></td>
<td>Seeks ideal solutions</td>
</tr>
<tr>
<td>IDEALIST</td>
<td>Speculative</td>
</tr>
<tr>
<td></td>
<td>Data meaningless w/o interpretation</td>
</tr>
<tr>
<td></td>
<td>Focus on underlying assumptions</td>
</tr>
<tr>
<td></td>
<td>Points out abstract conceptual aspects</td>
</tr>
<tr>
<td></td>
<td>Good at articulating goals</td>
</tr>
<tr>
<td></td>
<td>Best in unstructured, value-laden situations</td>
</tr>
<tr>
<td></td>
<td>Provides broad view, goals and standards</td>
</tr>
<tr>
<td>PRAGMATIST</td>
<td>Eclectic view</td>
</tr>
<tr>
<td></td>
<td>Seeks shortest route to payoff</td>
</tr>
<tr>
<td></td>
<td>Adapts in innovation</td>
</tr>
<tr>
<td></td>
<td>Any data or theory that gets us there</td>
</tr>
<tr>
<td>ANALYST</td>
<td>Formal logic &amp; deduction</td>
</tr>
<tr>
<td></td>
<td>Seeks &quot;one best way&quot;</td>
</tr>
<tr>
<td></td>
<td>Prescriptive theory and method over data</td>
</tr>
<tr>
<td>REALIST</td>
<td>Empirical view &amp; induction</td>
</tr>
<tr>
<td></td>
<td>Relies on &quot;facts&quot; &amp; expert opinion</td>
</tr>
<tr>
<td></td>
<td>Focus on payoffs</td>
</tr>
<tr>
<td></td>
<td>Points out realities &amp; resources</td>
</tr>
<tr>
<td></td>
<td>Good at simplifying, &quot;cutting through&quot;</td>
</tr>
<tr>
<td></td>
<td>Best in well-defined, objective situations</td>
</tr>
<tr>
<td></td>
<td>Provides drive &amp; momentum</td>
</tr>
</tbody>
</table>

### Strengths:
- Focus on underlying assumptions
- Points out abstract conceptual aspects
- Good at preventing over-agreement
- Best in controversial conflict-laden situations
- Provides debate & creativity
- Focus on process, relationships
- Points out values & aspirations
- Good at articulating goals
- Best in unstructured, value-laden situations
- Provides broad view, goals and standards

### Liabilities:
- May screen out agreement
- May seek conflict unnecessarily
- May try too hard for change & newness
- May try too hard for "perfect solutions"
- May screen out "hard" data
- May delay from too many choices
- May try too hard for expedition
- May overlook details
- Can appear uncommitted
- May screen out long-range aspects
- May rush too quickly to payoff
- May try too hard for expediency
- May rely too much on what "sells"
- Can appear over-compromising
- May screen out values & subjectives
- May over-plan, over-analyze
- May try too hard for predictability
- May be inflexible, overly cautious
- Can appear tunnel-visioned
- May screen out disagreement
- May rush to oversimplified solutions
- May try too hard for consensus & immediate response
- May over-emphasize perceived "facts"
- Can appear too results-oriented

## 5 Styles of Thinking

<table>
<thead>
<tr>
<th>Synthesist</th>
<th>Idealist</th>
<th>Pragmatist</th>
<th>Analyst</th>
<th>Realist</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apt to appear:</strong></td>
<td>Challenging, skeptical, amused; or appear tuned out, but alert when disagree.</td>
<td>Attentive, receptive; offer supportive smile, head nodding, much verbal feedback.</td>
<td>Open, scalable; often a good deal of humor; interplay, quick to agree.</td>
<td>Cool, studious, often hard to read; may be a lack of feedback, as if hearing you out.</td>
</tr>
<tr>
<td><strong>Apt to say:</strong></td>
<td>“On the other hand . . .”</td>
<td>“It seems to me . . .”</td>
<td>“I’ll buy that . . .”</td>
<td>“It stands to reason . . .”</td>
</tr>
<tr>
<td><strong>Apt to express:</strong></td>
<td>Concepts, opposite points of view; speculates, may identify absurdities.</td>
<td>Feelings, ideas about values, what’s good for people, concerns about goals.</td>
<td>Non-complex ideas; may tell brief personal anecdotes to explain ideas.</td>
<td>General rules; describes things systematically, offers substantiating data.</td>
</tr>
<tr>
<td><strong>Tone:</strong></td>
<td>Sardonic, probing, skeptical; may sound argumentative.</td>
<td>Inquiring, hopeful; may sound tentative or disappointed and resentful.</td>
<td>Enthusiastic, agreeable; may sound insincere.</td>
<td>Dry, disciplined, careful; may sound set, stubborn.</td>
</tr>
<tr>
<td><strong>Enjoys:</strong></td>
<td>Speculative, philosophical, intellectual argument.</td>
<td>Feeling-level discussions about people and their problems.</td>
<td>Enthusiastic, agreeable; may sound insincere.</td>
<td>Structured, rational examination of substantive issues.</td>
</tr>
<tr>
<td><strong>Apt to use:</strong></td>
<td>Parenthetical expressions, qualifying adjectives and phrases.</td>
<td>Indirect questions, aids to gain agreement.</td>
<td>Brainstorming around tactical issues; lively give-and-take.</td>
<td>Case examples, illustrations, popular opinions.</td>
</tr>
<tr>
<td><strong>Dislikes:</strong></td>
<td>Talk that seems simplistic, superficially polite, fact-centered, repetitive, “mundane.”</td>
<td>Talk that seems too data-bound, factual, “dehumanizing”, and openly confrontational and debate until about issues of caring or injury.</td>
<td>Talk that seems dry, dull, humorless; or too conceptual, philosophical, analytical, “nose-picking.”</td>
<td>Talk that seems irrational, aimless, or too speculative, “far-out”; and irrelevant humor.</td>
</tr>
<tr>
<td><strong>Stereotype:</strong></td>
<td>“Troublemaker”</td>
<td>“Bleeding Heart”</td>
<td>“Politician”</td>
<td>“Great Stone Face”</td>
</tr>
</tbody>
</table>

1. Learning to “Think”

Results of Exercise*:

<table>
<thead>
<tr>
<th></th>
<th>Pred. Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Analyst</td>
<td>30-35%</td>
</tr>
<tr>
<td>2. Realist</td>
<td>19-24%</td>
</tr>
<tr>
<td>3. Idealist</td>
<td>32-37%</td>
</tr>
<tr>
<td>4. Synthesist</td>
<td>6-11%</td>
</tr>
<tr>
<td>5. Pragmatist</td>
<td>13-18%</td>
</tr>
</tbody>
</table>

* (“The Art of Thinking”, A.F. Harrison & R.M. Bramson)

For me, charts and graphs in a book or article are usually:

1. More useful than the narrative, if they are accurate.
2. Useful, if they clearly display the important facts.
3. Useful, if supported and explained by the narrative.
4. Useful, if they raise questions about the narrative.
5. No more and no less useful than other material.
1. Learning to “Think”

Results for J. Ellis – complete test*:
(complete test is 18 questions, 5 answers, rank 5-1, total pts. = 270)

<table>
<thead>
<tr>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Realist 63</td>
</tr>
<tr>
<td>2. Analyst 60</td>
</tr>
<tr>
<td>3. Pragmatist 52</td>
</tr>
<tr>
<td>4. Idealist 48</td>
</tr>
<tr>
<td>5. Synthesist 47</td>
</tr>
</tbody>
</table>

Total 270

Conclusion:

Balanced after 40 years
Favor Realist & Analyst (no surprise!)
Would not have been like this 35 yrs ago
4 points or less is not statistically different

* (“The Art of Thinking”, A.F. Harrison & R.M. Bramson)
1. Learning to “Think”

Hints & Suggestions of how to “Think” for success in successful, rapid change management projects:

- **Strategic Thinking**
  - Game/War

- **Tactical Thinking**
  - You are always Selling

- **Tactical Thinking**
  - Think Business

- **Behavioral Thinking**
  - “I think I can, I think I can, I think I can”

  (The Little Engine that Could – W. Piper, 1930)
1. Learning to “Think”

The Second Tool for helping you “Think” will help you know if a person is “getting it” and at what level they are proficient in “getting it”.

(The Four Stages of Competence (Abraham Maslow, 1940)

• Unconscious Incompetence
• Conscious Incompetence
• Conscious Competence
• Unconscious Competence
How to:  

1. Learning to “Think”

• Apply the concepts introduced in this “Learning to Think” section.

• Read!

• Talk to peers.

• Go to seminars like the Lab Confab, War College, etc.

• Hire consultants that teach you how to “think” in change terms.

• Train your stakeholders, your change team and the active and passive recipients of your change in “Learning to Think”
1. Learning to “Think”

**Example:** Major Large Reference Lab with multiple sites - IA Inf. Disease Change Project

1. Had a core stakeholder & deployment team that was R&R and trained in *Change Thinking*. Team was primarily loaded with hybrids of *Analysts* and *Realists*. *Competency* was at a *Stage 3*.

2. *Strategic Thinking* – Analyze the competition, couldn’t win on traditional head-to-head, used a *guerilla tactic* to carve out new space of *Price vs. Value* and *Process vs. Technology Features*.

3. *Selling Thinking* – what was value *(success)* for the customer, how could it be measured, when did it need to be delivered, how much would it cost?

4. *Business Thinking* – what positive impact would it have on operations, what did the *financial business case* look like over multiple purchasing options, was it a good investment in the end?

5. *Behavioral Thinking* – could my team deliver on expectations and time frame, how did we get each site to be R&R and acting like the “little train”

**Results:** Won the contract, was not the lowest price bidder, demonstrated total overall lower cost due to process + product approach that delivered more value than competitive bid and current state. Delivered the major change over multiple sites with an excellent implementation plan that beat goal by 6 months. Exceeded expectations of the customer. Contract was renewed twice and still has not gone out for RFP.
1. Learning to “Think”

**Tool/s:** 5 Styles of Thinking  
The Four Stages of Competence

**Reference/s:**  
The Art of Thinking – A. Harrison & R. Bramson, 1982  
The Four Stages of Competence - A. Maslow, 1940  
The Art of War – Sun-tzu, 1994  
Guerilla Marketing – J. Levinson, 1984  
Consultative Selling – M. Hanan, 1995  
Successful Large Account Management (LAMP) – R. Miller & S. Heiman, 1991  
The Little Engine that Could – W. Piper, 1930

**Other Books to Consider:**  
Sacred Cows Make the Best Burgers – R. Kriegel & D. Brandt, 1996  
Who Moved my Cheese – Dr. S. Johnson, 1998

**Statement/s to Remember:**  
“You don’t know what you don’t know.”  
“The only constant is change.”
1. Learning to “Think”

In Summary

Leading a successful, rapid change management project requires you to “Learn how to Think” probably a little differently than you have in the past. Recognize that everyone thinks differently and that in your quest to be successful you will most likely run into all 5 Thinking Styles and combinations of them. Use various behavioral approaches for each individual that you must influence in order to be successful with your change project. Recognize the competency level of yourself and your team members as you progress through your project. Appropriately coach, assist, train, etc. for each team member based upon their competency level of the desired skill. Use the “Thinking” hints from those that have been successful leading change management projects. At the end of this step you will be ready to “Learn how to See” your change opportunities.
Leo Serrano, FACHE, DLM(ASCP) CM Lean/6 Sigma Black Belt

With over 40 years of laboratory leadership experience, he has a long history of being a change agent and thought leader. He was the driving force in leading the 2nd laboratory in the US to apply the Ortho Process Excellence program while at West Tennessee Healthcare in Jackson, Tennessee. As a Lean/6 sigma black belt Laboratory Director, he led the Process Excellence Program at Avera McKennan Hospital in Sioux Falls, South Dakota and while there they became the first US hospital laboratory to achieve CAP ISO 15189 Accreditation. He is currently the Corporate Director of Laboratory Services at Broward Health, the 10 largest public healthcare system in the US. Over the past 2+ years, he has led numerous change projects in the very competitive South Florida marketplace.
LEARNING TO SEE

LEO SERRANO
Learning to See

• Leadership – Leaders must:
  – Be customer focused
    • Voice of the customer
  – Challenge the status quo (A-I-O)
  – Promote tough standards
  – Be visible and available
  – Champion excellence
  – Act with integrity – (3 M’s)
  – Facilitate teamwork
It’s That “Vision Thing”

• "The very essence of leadership is that you have to have a vision. It's got to be a vision you articulate clearly and forcefully on every occasion."

—Theodore Hesburgh

President of the University of Notre Dame
Learning to See (examples)

• Need to do more with less!
  – Why do we do it this way?
    • 5 Why’s
    • Look at what can be changed? Be creative!
  – Decreasing volume/revenues – WHAT TO DO?
    • How do we do our work?
      – Value Stream, Process Map, SIPOC
    • What does the lab look like?
      – Take pictures of the lab- critique them
      – 5 S your lab
        » Sort, Segregate, Shine, Strengthen, Standardize
Learning to See

• What is wrong with the status quo?
  – Ask your “customers”

• Methods for Customer Input
  – Know who your customers are.
    • Customer satisfaction surveys
    • Improvement surveys – ask what they think
    • Measure areas surveyed
    • Encourage customer feedback-suggestion boxes
    • Visit with your customers – ask what they need
    • Customize the input process to fit the customer base.
Setting the Vision – Value Stream Mapping

- High-level view of all of the activities required to take a specific product from raw material (tube of blood) to the finished product (reported test result)
  - Current state map
    - Identifies current processes
    - Captures critical metrics
  - Future state map
    - Identifies projects to eliminate variation, errors and waste
    - Will become the new Current State
Challenge the Status Quo

• What is wrong with the status quo?
  • Ask your “customers”

• Value Stream Mapping
  – Allows for visualization of the processes in an orderly fashion
  – Allows for a timeline that shows time for each process or sub-process
  – Process Mapping just shows the processes in an orderly fashion-no timeline

• Spaghetti Diagrams
  – Useful for visualizing walk patterns pre and post lean design
Sample Spaghetti Diagram
Prioritizing The Opportunities

LEO SERRANO
Prioritization

• You should consider creating a prioritization matrix if:
  • You cannot do everything at once,
  • You are uncertain about the best use of your resources or energy or
  • You are looking toward specific improvement goals.
Prioritization

• For example, if the team is considering which improvement step to attack first, some of their criteria might be:
  – Low investment cost
  – Maximum use of existing technology
  – High potential dollar savings
  – High improvement potential for process speed
  – High improvement potential for defect reduction
  – High customer satisfaction potential
  – Minimum impact on other processes
  – Ease of implementation
  – High probability of quick results
## Prioritization Matrix

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Low Cost</th>
<th>Use of Technology</th>
<th>Potential Savings</th>
<th>Increased Speed</th>
<th>Decreased Defects</th>
<th>Customer Satisfaction</th>
<th>Minimal Impact</th>
<th>Easy to Implement</th>
<th>Quick Results</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Low Cost</td>
<td></td>
<td>5</td>
<td>0.1</td>
<td>0.2</td>
<td>0.1</td>
<td>0.2</td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>12.6</td>
<td>7.5%</td>
</tr>
<tr>
<td>b. Use of Technology</td>
<td>0.2</td>
<td></td>
<td>0.2</td>
<td>0.2</td>
<td>0.2</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>8</td>
<td>4.8%</td>
</tr>
<tr>
<td>c. Potential Saving</td>
<td>10</td>
<td>5</td>
<td></td>
<td>5</td>
<td>5</td>
<td></td>
<td>10</td>
<td>10</td>
<td>1</td>
<td>51</td>
<td>30.3%</td>
</tr>
<tr>
<td>d. Increased Speed</td>
<td>5</td>
<td>5</td>
<td>0.2</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>19.2</td>
<td>11.4%</td>
</tr>
<tr>
<td>e. Decreased Defects</td>
<td>10</td>
<td>5</td>
<td>0.2</td>
<td>1</td>
<td>1</td>
<td></td>
<td>5</td>
<td>5</td>
<td>1</td>
<td>28.2</td>
<td>16.7%</td>
</tr>
<tr>
<td>f. Customer Satisfaction</td>
<td>5</td>
<td>5</td>
<td>0.2</td>
<td>1</td>
<td>1</td>
<td></td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>27.2</td>
<td>16.2%</td>
</tr>
<tr>
<td>g. Minimum Impact</td>
<td>1</td>
<td>0.2</td>
<td>0.1</td>
<td>0.2</td>
<td>0.2</td>
<td></td>
<td>1</td>
<td>0.2</td>
<td></td>
<td>3.9</td>
<td>2.3%</td>
</tr>
<tr>
<td>h. Easy to Implement</td>
<td>0.2</td>
<td></td>
<td>0.1</td>
<td>0.2</td>
<td>0.2</td>
<td></td>
<td>1</td>
<td></td>
<td>0.2</td>
<td>3.1</td>
<td>1.8%</td>
</tr>
<tr>
<td>i. Quick Results</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0.2</td>
<td></td>
<td>5</td>
<td>5</td>
<td></td>
<td>15.2</td>
<td>9.0%</td>
</tr>
</tbody>
</table>

### Column Total

- Low Cost: 32.4
- Use of Technology: 27.2
- Potential Savings: 2.1
- Increased Speed: 9.6
- Decreased Defects: 8.7
- Customer Satisfaction: 8
- Minimal Impact: 33
- Easy to Implement: 37
- Quick Results: 10.4
- Total: 168.4

**% Total:** 100.0%
Steps

• Agree on the objective
• List criteria to meet the goal
• Compare relative importance of the criteria
• Evaluate your options against criteria

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Error prevention training</td>
</tr>
<tr>
<td>B</td>
<td>Purchase new equipment A</td>
</tr>
<tr>
<td>C</td>
<td>Purchase new equipment B</td>
</tr>
<tr>
<td>D</td>
<td>Refurbish existing equipment C</td>
</tr>
<tr>
<td>E</td>
<td>Refurbish existing equipment D</td>
</tr>
</tbody>
</table>
Steps

- Evaluate criteria against each other.

<table>
<thead>
<tr>
<th>Option</th>
<th>a</th>
<th>b</th>
<th>c</th>
<th>d</th>
<th>e</th>
<th>f</th>
<th>g</th>
<th>h</th>
<th>i</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Error Proofing</td>
<td>a</td>
<td>5</td>
<td>1</td>
<td>5</td>
<td>10</td>
<td>1</td>
<td>0.2</td>
<td>5</td>
<td>1</td>
<td>28.2</td>
<td>16.7%</td>
</tr>
<tr>
<td>b. New Equipment A</td>
<td>0.2</td>
<td>0.2</td>
<td>1</td>
<td>1</td>
<td>0.2</td>
<td>0.1</td>
<td>0.2</td>
<td>1</td>
<td>3.9</td>
<td>2.3%</td>
<td></td>
</tr>
<tr>
<td>c. New Equipment B</td>
<td>1</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>0.2</td>
<td>5</td>
<td>1</td>
<td>27.2</td>
<td>16.2%</td>
<td></td>
</tr>
<tr>
<td>d. New Equipment C</td>
<td>0.2</td>
<td>1</td>
<td>0.2</td>
<td>5</td>
<td>0.2</td>
<td>0.1</td>
<td>0.1</td>
<td>0.2</td>
<td>3.1</td>
<td>1.8%</td>
<td></td>
</tr>
<tr>
<td>e. New Equipment D</td>
<td>0.1</td>
<td>1</td>
<td>0.2</td>
<td>5</td>
<td>0.1</td>
<td>0.1</td>
<td>5</td>
<td>0.2</td>
<td>12.6</td>
<td>7.5%</td>
<td></td>
</tr>
<tr>
<td>f. New Procedures</td>
<td>1</td>
<td>5</td>
<td>0.2</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>15.2</td>
<td>9.0%</td>
<td></td>
</tr>
<tr>
<td>g. Barcoding</td>
<td>5</td>
<td>10</td>
<td>5</td>
<td>10</td>
<td>1</td>
<td>5</td>
<td>5</td>
<td>51</td>
<td>51</td>
<td>30.3%</td>
<td></td>
</tr>
<tr>
<td>h. Cellularize Option 1</td>
<td>0.2</td>
<td>5</td>
<td>0.2</td>
<td>1</td>
<td>0.2</td>
<td>0.2</td>
<td>0.2</td>
<td>0.2</td>
<td>8</td>
<td>4.8%</td>
<td></td>
</tr>
<tr>
<td>i. Cellularize Option 2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>0.2</td>
<td>5</td>
<td>1</td>
<td>19.2</td>
<td>11.4%</td>
<td></td>
</tr>
<tr>
<td><strong>Column Total</strong></td>
<td>8.7</td>
<td>33</td>
<td>8</td>
<td>37</td>
<td>32.4</td>
<td>10.4</td>
<td>2.1</td>
<td>27.2</td>
<td>9.6</td>
<td>168.4</td>
<td>100.0%</td>
</tr>
</tbody>
</table>
Steps

- Compare possible choices for remaining criteria
Steps

Bring it all together

Now Select the best options
4. Define Success for Each Change – (measure of success, time frame, value)

Description: Now that you have funneled all your potential change opportunities down to the one you are going to work on, where do you go from here? In order to be successful, complete in a “rapid” time frame and provide the leadership to accomplish these things you will need to know how to do this, what tools to use and have some examples and/or assistance from subject matter experts (SME’s). This section about defining success and making it time bound is the most important single thing to do right in your whole project plan. Do not underestimate the importance or the amount of time it takes to do this right. Do it right and you will look like a star at the end. Exceed expectations! Do it wrong and you will fail. At the end of this section you will have an operational definition of success, a preliminary CTQ Tree and time boundaries around accomplishment of goals.
4. Define Success for Each Change – (measure of success, time frame, value)

How To:

- **First** - Define Success with an operational definition, must be measurable
- **Second** - Make Success time bound Hint: Give yourself some room to “play” in your written documentation of what Success would look like. Better to under promise and over deliver.
- **Conduct VOC** (voice of the customer) interviews and tabulate the data
- Take time to directly observe and take notes of the current process
- **Create a CTQ Tree**
- Sort into primary and secondary CTQ’s (Critical to quality needs/drivers/where the pain is)
- **Complete your CTQ Tree**, as much as you can, which now has some measurements, goals and time boundaries around each Secondary CTQ that is impacting your one Primary CTQ
- Your **Primary CTQ should be a description of the one change** that you have funneled down to, e.g. Reduce Defects
- Your **Secondary CTQ’s should be the drivers** that are producing Defects, e.g. one might be – too many QNS chemistry tubes. The metric for this Secondary CTQ could be Range of % QNS Chem Tubes in one work week. The goal could be - reduce my % QNS chemistry tubes from a weekly range of 28-31% down to at least 15-18%. The time boundary for the goal could be within the next 30 days.
- Do this for all CTQ’s and **get buy off from your customer**.

“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014
4. Define Success for Each Change – (measure of success, time frame, value)

**How To:**

First - Define Success with an operational definition, must be measurable

Second - Make Success time bound - Hint: Give yourself some room to “play” in your written documentation of what Success would look like. Better to under promise and over deliver.

**Reduce defects in the core lab** - Change Management Project selected from Thinking, Seeing and Prioritizing

**Operational Definition:** Reduce defects in my top 3 defect categories

**Time frame:** 1 month

**Measure of Success:** Greater than 30% reduction in each category

“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014
4. Define Success for Each Change – (measure of success, time frame, value)

How To:

Conduct VOC (voice of the customer) interviews and tabulate the data

Take time to directly observe and take notes of the current process

Conduct “Customer” Interviews: Setup 20 minute interviews with representative lab staff from all shifts and external lab customers to flush out types of defects and relative importance of these defects from each of their perspectives. Get this done in 5 days or less.

Sort, analyze interview data: List types of defects in order of severity from the collective input from the interviews.

Direct Observation of Current Process: Go directly observe the process at representative times throughout a complete production cycle (usually 24 hrs.) as you are conducting interviews and take notes of what types of defects you see and rank them in severity. This is not a deep dive into collecting data that will be done during the Measure phase of your project.

“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014
4. Define Success for Each Change – (measure of success, time frame, value)

How To:

Create a CTQ Tree

Sort into primary and secondary CTQ’s (Critical to quality needs/drivers/where the pain is)

Complete your CTQ Tree, as much as you can, which now has some measurements, goals and time boundaries around each Secondary CTQ that is impacting your one Primary CTQ.

Your Primary CTQ should be a description of the one change that you have funneled down to, e.g. Reduce Defects

Your Secondary CTQ’s should be the drivers that are producing Defects, e.g. one might be – too many QNS chemistry tubes. The metric for this Secondary CTQ could be Range of % QNS Chem Tubes in one work week. The goal could be - reduce my % QNS chemistry tubes from a weekly range of 28 -31% down to at least 15-18%. The time boundary for the goal could be within the next 30 days.

“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014
My Chem/IA process has too many manual steps. I need to be more connected thru automation.

1. Count & record the number of manual steps and the number of automated steps in the Chem/IA process from pre thru post analytical. Also calculate the % of manual & automated steps to the total number of process steps.

Goal: >38% reduction in number of manual steps

Time Frame: 6 months post automation Go-Live

“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014
Lab example of how a need (Primary CTQ) transforms into multiple Secondary CTQ's. This example looks at one area of need – **Financial/Cost** (scope is Chem/IA pre, analytical & post):

<table>
<thead>
<tr>
<th>Need (Primary CTQ)</th>
<th>Pain (Secondary CTQ)</th>
<th>Metric</th>
<th>Goal</th>
<th>Time Frame (to Achieve Goal)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need to better understand key “things” that drive the financials &amp; costs of my lab operation</td>
<td>I don’t truly know my daily input &amp; output</td>
<td>Record multiple weeks of input (tubes) &amp; output (results) by type</td>
<td>Setup visual display of daily input &amp; output with graphs</td>
<td>3 months post automation Go-Live</td>
</tr>
<tr>
<td></td>
<td>I think I may be sending too many tests out</td>
<td>Record rep 24 hr # of sendouts &amp; calculate as % of rep 24 hr output</td>
<td>Agree on what % should be &amp; decide to change or not, setup tracking display</td>
<td>3 months post automation Go-Live</td>
</tr>
<tr>
<td></td>
<td>I am not taking full advantage of autoverification</td>
<td>Record % autoverification by test over multiple 24 hr periods</td>
<td>&gt;60% autoverified</td>
<td>6 months post automation Go-Live</td>
</tr>
<tr>
<td></td>
<td>My lab is growing each year</td>
<td>From historical data calculate actual % growth for past 3 yrs &amp; predict future 3-7 yr growth</td>
<td>Setup accurate data driven growth tracker &amp; predicting process</td>
<td>3 months post automation Go-Live</td>
</tr>
<tr>
<td></td>
<td>I need to see when &amp; where my tests are coming from</td>
<td>Record multiple weeks of when &amp; where tubes come in. Categorize by location. Graph the data.</td>
<td>Setup visual display tracking of source and time for tubes</td>
<td>6 months post automation Go-Live</td>
</tr>
<tr>
<td></td>
<td>We could be doing too many repeats</td>
<td>Record rep 24 hr # of repeats &amp; calculate as % of rep 24 hr output</td>
<td>Agree on what % should be &amp; decide to change or not, setup tracking display</td>
<td>6 months post automation Go-Live</td>
</tr>
<tr>
<td></td>
<td>I am not hitting my assigned Productivity goal &amp; it is costing me $’s</td>
<td>HPBU report</td>
<td>Hit or exceed goal of 0.12 100% of time</td>
<td>6 months post automation Go-Live</td>
</tr>
<tr>
<td></td>
<td>I am spending too much on overtime</td>
<td>Record overtime $’s paid out in last 12 months for Chem/IA</td>
<td>&gt;30% reduction</td>
<td>12 months post automation Go-Live</td>
</tr>
<tr>
<td></td>
<td>I think I am spending too much on labor for the number of tests I run</td>
<td>Calculate a rep tests produced per paid labor hour for Chem/IA</td>
<td>&gt;20% improvement</td>
<td>12 months post automation Go-Live</td>
</tr>
<tr>
<td></td>
<td>I think I should be able to produce more tests in the space I have</td>
<td>Calculate a rep tests produced per sq ft of lab space in Chem/IA</td>
<td>At least 10% or greater improvement</td>
<td>12 months post automation Go-Live</td>
</tr>
</tbody>
</table>
More Examples of Primary CTQ Needs & Categories of Needs:

- Quality  Defects
- Quality  Customer Satisfaction Scores
- Quality  Rework
- Quality  Accuracy of Result/Diagnosis
- Quality  Employee Satisfaction
- Productivity  Footprint square footage
- Productivity  Reported Results/Paid Labor Hr.
- Financial/Cost  Output/Cost
- Financial/Cost  Labor Consumed
- Service  MTBF
- Service  Back Orders
- Service  Shipment Errors
- Service  Down time for maintenance
- Safety  Noise
- Safety  Lost time due to accidents
Reduce Core Lab Defects Example:

Need  
(Primary CTQ)

Pain  
(Secondary CTQ)

Metric

Goal

Time Frame  
(to Achieve Goal)

1. Too Many QNS Tubes  
   # & % QNS tubes/rep 24 hrs  
   >30% reduction  
   1 Month from start of project

2. Stat Trop. I TAT too long & variable  
   Stat Trop. I mean, time to reach 90%, std dev, per rep 24 hrs  
   >30% reduction all metrics  
   1 Month from start of project

3. Too many missed scanned tubes  
   # & % of missed scanned tubes per rep 24 hrs  
   >30% reduction  
   1 Month from start of project

4. Too many missed LIS assessments  
   # & % of missed LIS assessments per rep 24 hrs  
   >30% reduction  
   1 Month from start of project

5. Too many Add-on’s  
   # & % Add-on’s per rep 24 hrs  
   >30% reduction  
   1 Month from start of project

6. Too many repeats  
   # & % Repeats/rep 24 hrs  
   >30% reduction  
   1 Month from start of project

At this stage you don’t yet know which Secondary CTQ’s are the Top 3.

“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014
4. Define Success for Each Change – (measure of success, time frame, value)

How To

Do this for all CTQ’s and get buy off from your customers

Customer Sign Off: This CTQ document is the most important document of your project! It is a living document that you will rev as you move through the steps of your project. You now know what Success is, how to measure it, how much time you have to achieve it and what value it will bring to your customers when completed successfully. Keep it visible and updated! Use it in your progress communications.

“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014
4. **Define Success for Each Change** – (measure of success, time frame, value)

“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014
4. **Define Success for Each Change** – (measure of success, time frame, value)

**Tool/s:** Voice of the Customer (VOC) Interviews  
Critical to Quality (CTQ) Tree

**Reference/s:** The Six Sigma Memory Jogger - M. Brassard, et. al., 2002

**Statement/s to remember:**  
“Garbage in, Garbage out” – author Unknown  
“CTQ’s are to Value as Westgard Rules are to QC” – J. Ellis 2014
PICKING YOUR TEAM

LEO SERRANO
KEY CRITERIA

• Form a powerful coalition –
  – They will support your change effort

• Get a good mix in your team
  – Check titles at the door

• Create the Vision within the team
  – Help them articulate the vision
  – Identify the top priorities to accomplish the mission.

• Communicate the vision to all around you.
  – Develop a 90 second elevator speech.

LEAD BY EXAMPLE
What to look for

- To achieve High Performance a team needs diversity in the orientation of its individual team members:
  - Some team members will be needed who are primarily oriented towards task and target date accomplishment.
  - Other team members will be needed who hold process, planning, organization and methods in the highest regard.
  - Teams also need members who nurture, encourage and provide communication nodes. Otherwise, anarchy and intense frustration can result, as individuals demand that "their way" is "the only way."
  - Teams will certainly need some members who are creative and innovative. This quality is helpful when product design, inspiration, optimism or humor is needed.
  - The final type of team member needed by a High Performance Team is a floater-someone who is capable of identifying with all of the above orientations and can fill in when one of the viewpoints is missing.
The Process Excellence team at Avera McKennan is a good example of a diverse team.

1. There was a member from the chemistry area who while very bright and technically capable and organized was seen as quiet and bland. Too laid back to be a leader (became the de-facto leader).

2. Another member was young, aggressive, open to new ideas and working on an off shift. (creative, the designer)

3. A third member was calm, detail oriented, analytical, well spoken but not overly aggressive. Working on an off shift, this person consistently looked for ways to reduce waste. (the float)

4. A fourth member worked in Client Services – very bright, nurturing, organized, detail and customer oriented. (the communicator)

5. The fifth member had been out of the working lab for many years- very IT oriented and nurturing. (a mother figure)

Most importantly they worked as a team.
Picking Your Team
6. **Gantt your time line** for the complete project (all steps of DMAIC)

**Description:** Since you have now time bound your change project when you defined Success, you better be sure that you have a **documented, detailed plan** to complete your project in the time period you bound it to. This plan should be easy to follow and detail each step, each Milestone, who is accountable and what is accomplished. The plan should have some flexibility built in but be rigid enough to **meet or exceed your goals for completing the plan on or before the deadline**. The plan needs to have **approval from your Stakeholders** and those affected by the change. Your core change team should have input into creating the plan and approving the final version. Your plan should be very **visible and displayed** in the area affected by the change. You should conduct **weekly meetings** to provide updates and any changes to the plan. At the end of this section then you will be ready to execute.
6. Gantt your time line for the complete project (all steps of DMAIC)

How To:

- Start out simple with a one change plan that can be completed in 30 days or less
- Use a simple one page Excel spread sheet
- Follow the 5 step model of DMAIC
- Color code the 5 steps
- Break it down into days of the month
- Color code activities that are not completed and then change the color when completed
- Show who is accountable for each activity/action
- Have the plan mounted on a poster board from Kinko’s that you can display in your office, meetings, the area impacted, etc.
- Conduct weekly updates and progress meetings
- Seek professional project management expertise as you take on more complex projects
- Take a course in project management
- Learn how to make and use Gantt charts
- Have someone on your team become project management certified

“Make your Plan, Work your Plan” – P. Quattrini, 1975
6. **Gantt your time line** for the complete project (all steps of DMAIC)

![Gantt Chart Image]

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For more information contact:
J. Ellis at jellisaiken@gmail.com and/or
L. Serrano at Lserrano1944@gmail.com

10/23/2014
6. **Gantt your time line** for the complete project (all steps of DMAIC)

![Gantt chart](image-url)
6. **Gantt your time line** for the complete project (all steps of DMAIC)

<table>
<thead>
<tr>
<th>Stage</th>
<th>Who is Accountable</th>
<th>Project Starts on</th>
<th>Project Ends on</th>
<th>Next</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Learning to Think - Get your mind ready!</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>2. Review Module &amp; require R&amp;D input</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>3. Learn to Set - Get to your short list of opportunities!</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>4. Prioritize Opportunities - Get to One</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>5. Define Success - One project, measurable &amp; time bound!</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>6. Gantt your Project Time Line</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>7. Find &amp; Set - Get the best tools to apply</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>8. Organize a Prioritization Team</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>9. With the help of your Prior. Team go thru tools &amp; get to one project</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>10. Hold aside the other projects &amp; place them in your “Job Jar”</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>11. Review Module for appropriate materials and approach</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>12. Conduct VOC interviews &amp; delineate results</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>13. Walk the Current State Process that will be impacted &amp; take notes</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>14. Create your CTQ Tree in as much detail as you can</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
<tr>
<td>15. Have your Customer &amp; Stakeholders sign off on your CTQ Tree</td>
<td>Project Leader</td>
<td>1</td>
<td>2</td>
<td>P21</td>
</tr>
</tbody>
</table>

**Note:** For more information contact:
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6. **Gantt your time line** for the complete project (all steps of DMAIC)

<table>
<thead>
<tr>
<th>#</th>
<th>Stage</th>
<th>Who is Accountable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Learning to Think - Get your mind ready!</td>
<td>Project Leader</td>
</tr>
<tr>
<td>2</td>
<td>Review Module &amp; acquire R&amp;R mindset</td>
<td>Project Leader</td>
</tr>
<tr>
<td>3</td>
<td>Review reference books &amp; focus on any appropriate material</td>
<td>Project Leader</td>
</tr>
<tr>
<td>4</td>
<td>Review Module and concentrate on tools you want to use</td>
<td>Project Leader</td>
</tr>
<tr>
<td>5</td>
<td>Identify the &quot;Burning Platforms&quot;</td>
<td>Project Leader</td>
</tr>
<tr>
<td>6</td>
<td>Use the &quot;5 Why's&quot; to help you understand the opportunities</td>
<td>Project Leader</td>
</tr>
<tr>
<td>7</td>
<td>Develop your list to go to the next step of Prioritization</td>
<td>Project Leader</td>
</tr>
<tr>
<td>8</td>
<td>Prioritize the Opportunities - Get to One!</td>
<td>Project Leader</td>
</tr>
<tr>
<td>9</td>
<td>Review Module and decide on tools to apply</td>
<td>Project Leader</td>
</tr>
<tr>
<td>10</td>
<td>Organize a Prioritization Team</td>
<td>Project Leader</td>
</tr>
<tr>
<td>11</td>
<td>With the help of your Prior, Team go thru tools &amp; get to one project</td>
<td>Project Leader/Prior. Team</td>
</tr>
<tr>
<td>12</td>
<td>Hold aside the other projects &amp; place them in your &quot;Job Jar&quot;</td>
<td>Project Leader</td>
</tr>
</tbody>
</table>

For your 1st few projects you will need to spend some time getting ready. Steps 1 -6 are things you do in the Pre-Execute days (P-days), 22 P days in this 1 month example.
6. **Gantt your time line** for the complete project (all steps of DMAIC)

Remember to change color code for tasks from yellow to green when completed. Plan your days appropriately when you have more than one task happening on a particular day.
6. **Gantt your time line** for the complete project (all steps of DMAIC)

If you have not used DMAIC tools before in project execution, best to bring in an SME who has had experience, not just book trained! Consider your suppliers as a potential resource pool.

Things can get a little hectic at presentation time. Plan, Plan, Plan! Start preparing at least a week before your project is due to finish. SME’s can really help you out here too.

“**A**” Days are after your project officially ends. In this example, 5 days.
6. **Gantt your time line** for the complete project (all steps of DMAIC)

**How To:**

- Start out simple with a one change plan that can be completed in 30 days or less
- Use a simple one page Excel spread sheet
- Follow the **5 step model of DMAIC**
- Color code the 5 steps
- Break it down into days of the month
- Color code activities that are not completed and then change the color when completed
- Show who is accountable for each activity/action
- Have the plan mounted on a poster board from Kinko’s that you can display in your office, meetings, the area impacted, etc.
- Conduct weekly updates and progress meetings
- Seek professional project management expertise as you take on more complex projects
- Take a course in project management
- Learn how to make and use Gantt charts
- Have someone on your team become project management certified

“Make your Plan, Work your Plan” – P. Quattrini, 1975
6. **Gantt your time line** for the complete project (all steps of DMAIC)

**Tool/s:**
- Gantt Chart
- Excel Spreadsheet
- DMAIC roadmap
- Kinko’s

**Reference/s:**
- Project Management for Dummies – S. Portny, 2013
- Google Search for images of Gantt Charts
- The Six Sigma Memory Jogger - M. Brassard, et. al., 2002

**Statement/s to remember:**
“Make your Plan, Work your Plan” – P. Quattrini, 1975

Send me an email and I will send you the Excel file of the Gantt Chart. jellisaiken@gmail.com
Learning to EXECUTE

Jim Ellis and Leo Serrano
7. Learning to “Execute” your plan

Description: At this point in time you have “Learned to Think”, “Learned to See”, Prioritized your Opportunities to one project, Defined Success & Created a preliminary CTQ Tree, Picked your Team & Stakeholders and drawn up a first pass at a Gantt time line of your project. Now you are ready to begin working your plan (executing). The execution of your plan continues to follow the DMAIC roadmap that you have illustrated in your Gantt Chart. This section begins at the Measure Phase and concludes at the end of the Control Phase. The slides provided in this section illustrate some of the type of output you can expect from execution of a change project. Other examples will be found in the slides from the final presentation section. For this section we will use the 1 month project example shown in the Gantt your project time line section.

Until you become proficient at the skill of project execution the best way to learn and accelerate your project is to get some expert help in this stage of your project. Again, if you start with short, less complex projects you can learn more quickly and then move to longer, more complex projects. Learn from an expert if you can so that you do it the “right” way from the beginning. At the end of this section you should have all the data you need to create a final presentation of your project.
7. Learning to “Execute” your plan

How To:

- You need to be the “air traffic controller” and always stay at least one week ahead of the current week.
- Recap each week on Friday and set the stage for the following week. Communicate your recap and next week’s plan in formal documentation.
- Foresee anything that could alter or change a date by staying in constant communication with all those doing the work.
- IT is always a wild card – plan accordingly.
- Anticipate needed supplies and order with plenty of lead time.
- If you have renovations to do be sure you work closely with operations/facilities to avoid delays.
- For longer and more complex projects, set aside a “war room” (lockable) so that you have a secure, quiet place to work on your project, meet with your team and display your project plan, progress and results.
- Hold those assigned accountable for hitting deadlines – customers included, nobody gets a free pass.
- Meet with your team on Monday AM to kick off the week and on Friday AM-PM to recap.
7. Learning to “Execute” your plan

- Keep your **Stakeholders informed** weekly of the progress.
- **No excuses, no slackers!**
- **Plan to beat** your plan’s deadline by a few days
- Don’t underestimate how difficult and **time consuming a pilot and implementation** can be.
- Implementation should be a **gradual hand-off and transition** to be sure the folks you need to “Teach how to fish” are proficient before you and your team move on.
- Consider **outside help** while you are learning these skills, e.g. outside consultants, outside your department, your suppliers, etc.
- Create **lots of visual displays**, scorecards, an audit process, SOP’s, andons, mistake proofing, 5’S cleanup days, have fun, contests, prizes, visibility, communication!
- There is **no substitute for direct observation**, computer printouts and reports are next best, word of mouth is last resort.
- If production runs over 24 hrs., be sure you **observe a few representative 24 hr production turns**.

If you have not used DMAIC tools & not followed a DMAIC pathway before in project execution, best to bring in an SME who has had experience, not just book trained! Consider your suppliers as a potential resource pool or outside consultants.
7. Learning to “Execute” your plan

DMAIIC – Measure (its all about the Current State – is it Capable?)

- Value Stream
- Process Map
- Data Collection Plan – how much is enough?
- Is Current State in Control? – Control Charts
- Is Current State Capable? – Specs (VOC) vs. Control Limits
- Funneling – the trivial many X’s – FMEA
7. Learning to “Execute” your plan
Creating the Current-State Value Stream Map

Ref “Learning to See” Rother & Shook
# 7. Learning to “Execute” your plan

**Measure: Data Collection Plan Features**

<table>
<thead>
<tr>
<th>Data Collection Plan</th>
<th>Project ________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>What questions do you want to answer?</td>
<td></td>
</tr>
</tbody>
</table>

**Being clear about your question will help you make sure you collect the right data.**

<table>
<thead>
<tr>
<th>Data</th>
<th>Operational Definition and Procedures</th>
</tr>
</thead>
<tbody>
<tr>
<td>What</td>
<td>How measured ¹</td>
</tr>
<tr>
<td>Measure type/ Data type</td>
<td></td>
</tr>
</tbody>
</table>

**Recording what data you are going to collect reminds you what you want to accomplish. Noting the type of data helps you decide how you should analyze the data.**

**An operational definition defines exactly how you will go about collecting and recording the data.**
7. Learning to “Execute” your plan

One of 6 Secondary CTQ’s you identified from the Define Phase (VOC) – do this for all 6.

Example: One Secondary CTQ tracking along DMAIC pathway of execution:

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<tr>
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<td>Secondary CTQ</td>
<td>Predicted Metric</td>
<td>Goal State</td>
<td>State</td>
<td>Results</td>
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<td>28-31%</td>
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“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014
7. Learning to “Execute” your plan

Measure: Control Chart – Current State VOP

Control limits (calculated from data) added to plot

Centerline usually average instead of median

DEFECTS!
7. Learning to “Execute” your plan

Innovative Improvement: Current Value Stream Map with Kaizen Bursts indicating opportunity areas for improvement from Brainstorming activities

Ref “Learning to See” Rother & Shook
7. Learning to “Execute” your plan

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<td>Future State</td>
<td>Pilot Results</td>
<td>Results at 6 Months</td>
<td>Go-Live</td>
<td>Go-Live</td>
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<td>CTQ (pain)</td>
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<td>Results</td>
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<tr>
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<td>(pain)</td>
<td>Metric</td>
<td>Direction</td>
<td>Goal</td>
<td>Current</td>
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- **Reduce Defects in my core Lab**
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Control: Visual Work Place Examples

- Cleaning station
  (Is anything missing?)

- Production Control Board

- Inventory pick-up/drop-off locations
Control: Visual Work Place Examples

Line of Sight – Performance Boards – Andon
Control: Visual Work Place Examples

Performance Boards
Rating Scale Guide

<table>
<thead>
<tr>
<th>Score</th>
<th>Description of Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>No apparent attempt to institute/enforce &amp;/or adhere to the principle</td>
</tr>
<tr>
<td>2</td>
<td>Principle has been instituted, but no apparent attempt to enforce or sustain</td>
</tr>
<tr>
<td>3</td>
<td>Principle has been instituted and displays signs of sustainability and enforcement</td>
</tr>
<tr>
<td>4</td>
<td>Principle is being sustained and enforced, and there are positive signs of a plan to track performance</td>
</tr>
<tr>
<td>5</td>
<td>Principle is sustained and enforced. Kaizen events occur frequently.</td>
</tr>
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Control: The Periodic Audit (great tool for sustaining improvements)
### 7. Learning to “Execute” your plan

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“CTQ’s are to Value as Westgard Rules are to QC”, J. Ellis 2014

Next up: Leo’s thoughts on Execute.
How To:

• Become the “air traffic controller”. Keep 1 week ahead
• Recap weekly – set the stage for the week to come
• Anticipate roadblocks, delays. Stay connected
• IT wild card – plan for it.
• Anticipate supplies, needs, etc.
• Dedicate an area for the project
• Accountability- non negotiable item.
• Keep stake holders up to date-regularly
• Beat your plan’s deadline – no slackers!!

Never underestimate the difficulty!!
How to:

• Implementation should be a gradual handoff to the folks who will ultimately work.
  – “Teach them to fish proficiently” before you leave

• Use lots of visuals, score cards, 5 S cleanup days, etc

• Bring in outside help if necessary –
  – Vendors, suppliers, other departments can help

• Manage by walking around – GEMBA GEMBUTSU
  – Direct observation is best, computer reports, printouts, etc. are next best. Word of mouth is last resort.
Examples:

Implementation of a Lean Workcell in a traditional discipline-oriented laboratory:

– Three key priorities needed
  • Cross train the staff (Hematology and Chemistry)
    – Many may not have worked the area in decades
  • Develop the workcell and its processes
    – Don’t be afraid to “try-storm” – DMAIC/DMADV
  • Train the staff on the new processes
    – This is critical. Select key staff who have become proficient in the new process and let them become the trainers.
    – Remember processes continuously improve but must be standardized for ALL.
7. Learning to “Execute” your plan

**Tool/s:** Data Collection Plan  
DMADV  
DMAIC  
Process Mapping  
Spaghetti Diagram  
Workplace Design

**Reference/s:** The Six Sigma Memory Jogger – M. Brassard, et. al., 2002  
Google Search – Impact vs. Effort matrix  
The LEAN toolbox  
LEAN SIGMA

**Other Books to Consider:**  
Execution: The Discipline of Getting Things Done – L. Bossidy, et. al., 2002

**Statement/s to Remember:**  
“Innovation distinguishes between a leader and a follower” - **Steve Jobs**  
“Creativity before Capital” - unknown author  
“Make your Plan, Work your Plan” – P. Quattrini, 1975  
“In God We Trust, All Others Must Bring Data” – author unknown  
“The only easy day was yesterday” – US Navy Seal motto
JOB JAR

LEO SERRANO
CREATING THE JOB JAR

• Use for items that came forth but were not part of the priority matrix or original project scope.
  – These items can be addressed after the main project is completed
    • Can use members of main team to “lead” using existing staff from the area so that they have ownership.
    • Does not detract from main project and allows for further hardwiring of the methodology of the team members as well as rank and file staff.
Examples

During Lean project of “core lab”, the following areas were identified and “job jarred”:  
• Courier routing and arrival-  
  – Affects specimen processing and routing  
• Microbiology Set up and workflow  
  – Setup and processing affects both central processing as well as the actual microbiology workflow  
• Processing Referred Tests  
  – What happens after they are separated from routine work? Time and temperature sensitive
TIPS

• Can each be tackled by a smaller team?
  – Take a member from the previous team to lead and teach

• Which has the most impact on the overall lab operation?
  – Use a prioritization matrix to determine

• Often smaller projects can proceed simultaneously when done by separate teams
  – The original team can split to lead the next projects
9. Presentations to Stakeholders, Customers, & Team

Description: At this stage of your project you have executed your plan and fully implemented your change. You have established control procedures to be sure you can sustain the improvement. You have key performance metrics (KPM’s from your CTQ’s) in place and you are monitoring them on a real-time basis with appropriate visual aids and scorecards. You have created a job jar for future change projects. You are ready to give final presentations to stakeholders, customers, those impacted by the change plus your team members. Depending on the scope and complexity of your change project, the presentations you give will range from simple to complex. In our experience if you see an example of complex and learn the components of complex then it is very easy to scale down to any level below complex. Therefore, for this workshop we will concentrate on the components of a complex, final presentation. Final refers to a time when you are realizing all the benefits from the change plan you put in place. In a complex project you will most likely need to give presentations multiple times, e.g. at the beginning to gain approvals and funding, at specific Milestones such as pilot results, go-live, IT connected, automation in place, one-month post full go-live, etc. Again, if we concentrate on a complex, final presentation then scaling back in time and complexity will be fairly easy.

This module is best assimilated by taking quiet time and reading through it a few times. The slides in this module are your Cliff’s Notes for how to assemble your final project presentation/s.
9. Presentations to Stakeholders, Customers, & Team

With the complex, final presentation you will probably have to deliver it multiple times to different audiences. Therefore, you will need to prepare multiple versions of it depending on your audience. Once again, if you build the most complete one with all details then you can scale it down for various audiences. Never give a full detail 1-2 hr presentation to anyone at the “O” level, e.g. COO, CEO, CFO, CMO, etc. Those that are impacted by your change will need to see the most detail and you will probably need 1-2 hrs to go over the full presentation. Stakeholders will need a presentation somewhere closer to the “O” level with slightly more detail. Directors, managers and supervisors will need somewhere between 30 and 60 minutes. Best to keep all your slides in an Appendix and/or hidden so that if you get asked a detail question you can quickly go to the appropriate slide/s. The key is to gauge the length and detail of your presentation to your audience.
9. Presentations to Stakeholders, Customers, & Team

Components of a complex, final presentation where you need all detail:

- Audience is a group of “Customers” impacted by the change
- Usually 1-2+ hrs. with Q&A
- Usually 50 – 100+ slides
- Title Slide (include a picture here if you can, e.g. institution, lab, team, change, etc.), list presentation date and presenters
- Agenda with bullets and names of presenters for each section if multiple presenters
- “Ho-Hum Crasher” (ending of your story) - “We/You have the opportunity over the next X time to double our output with 40% less input by doing _______ or investing in __________.” In the next ________ minutes I will show you how we are or how we did do this.

Versions of this phrase above should be used at the beginning of your presentation for all presentations at all levels and at all times in your project life cycle from beginning to end. This is the “beef” and this is “What’s in it for THEM”. For an “O” presentation you can eliminate the agenda slide and just have your title slide say “Executive Summary of __________ Change Project”. Complete Executive Summary should only be 5-6 slides max. You pick what slides from your full detail presentation to use to support your “Ho-Hum Crasher”.

Create a Ho-Hum Crasher around Defect example: Reference slide #83. You just went Live and have results and now have your presentation to your Stakeholders.

What was the one I used on you today? (way back at intro)

Write one down and pass to your neighbor.

Don’t turn to next slide yet.
Ho-Hum Crasher:

Our 1st Successful, Rapid Change Management Project in the Core Lab

Reduced our Top 3 Lab Defect Categories by Over 30%!

We completed the execution of the project in slightly less than one month. Let us show you how we did it!
9. Presentations to Stakeholders, Customers, & Team

- **Description of the problem** (excerpts from a project Charter doc can be used here)
- **Summary of VOC Interviews** – highlight your Voice of the Customer findings, especially those that refer to the pain associated with your Primary CTQ. Also, show comments that call out the Secondary CTQ’s you chose.
- **CTQ Tree – Very important Slide!** Summarizes what data you will collect for Current & Future State, what your key performance metrics will be to measure Success, what your success goals are compared to the Current State, and states your time boundary for the project. Remember – “CTQ’s are to Value as Westgard Rules are to QC”.
- **Review of Data Collection Plan for Current State Measurements** – focus on Secondary CTQ’s, use a team agreed to formal data collection plan.
- **Summary of Current State measurements** expressed in metrics of your Secondary CTQ’s
- **Summary of Analysis of the Current State measurements** – is the Current State sustainable? Does it meet Customer specs 100% of the time? Does it have too much variability? Does the Voice of the Process (VOP) match up to the VOC? This analysis will indicate areas where the Current State can be improved. Be sure this is obvious in your presentation.
9. Presentations to Stakeholders, Customers, & Team

- **Summary of the Change Improvement** – how did you arrive at what and how to improve the Current State? The analysis of the Current State in objective terms is how you arrive at what to improve. **Each Secondary CTQ should have a plan in place to improve it for this stage.** Talk about how you arrived at your improvement plan. How you piloted the improvement plan. What results you got from the pilot. What the improvement looked like compared to the Current State. How you created your full Implementation Plan and what it looks like. How did you implement? **What were the results in terms of key performance metrics once implemented?** Show actual results of implemented **key performance metrics vs. those that came from the Current State measurements.** Show that you met or exceeded the goals set from your Secondary CTQ Tree. This stage is data rich and could have 50+ slides in a full detail presentation.
9. Presentations to Stakeholders, Customers, & Team

At the end of the tech detail you are now going to review the Financial Business Case and show analysis of costs vs. benefits across a predetermined time frame with predetermined time intervals. This is where the Profit Improvement Proposal or PIP is presented. If this is a final presentation the PIP, if it was deemed appropriate to use, will be presented in final rev. If the PIP is to be used, which you will decide early on with your team, then at this stage in final presentation your audience will have seen it before many times and seen how it evolved from an example to a predicted form and now in its final rev. We strongly suggest when you decide to use this tool, which can be extremely powerful, that you get some expert advice and training before presenting even in example form. By this time you will have learned how your institution evaluates investments, what the criteria is for investment analysis and what is pass/fail for each criteria. You will have gotten all your costs identified and quantified the impact of your change (the benefits). Next you will run the cost vs. benefit analysis against all appropriate investment analysis criteria and produced the results. These results will be displayed in most likely an Excel spreadsheet which you will have made into a slide and a poster board. Use these for your presentation at this point in the presentation. Be sure it is all good news before you present.
9. Presentations to Stakeholders, Customers, & Team

Example of Very Simple Financial Justification:
(no complex PIP required)

Simple PayBack on Capital Purchase

- **Total Capital Expense**
  - $955K

- **Labor Enhancement Benefit – 4.5 FTE’s**
  - $270K/yr.
  - (assumes $60K/FTE)

- **Simple PayBack Time**
  - 3.5 Yrs.
The analysis of “Before & After” metrics will provide accurate information to generate a true cost to benefit report to show the customer how financially sound their decision was.
9. Presentations to Stakeholders, Customers, & Team

When you are doing presentations before you have done a pilot of the improved Future State then this whole section would be made up of Predicted Future State outcomes around the key performance metrics. Also you would predict what the future state would look like based on the improvements you want to make. After full implementation you would go back and compare what you predicted to the actual results. When you get good at this you want to set it up so that you always exceed expectations of the actual deliverables compared to your predicted deliverables.
9. Presentations to Stakeholders, Customers, & Team

- **Sustaining the Gain** – Summary of the Control phase of your project where you have now incorporated this change into a standard operating procedure and it is now the new Current State. How did you train the folks who are impacted in the new process? What kind of Mistake Proofing did you put in place? What key performance metrics are you monitoring to insure the performance gain is being sustained? If a metric goes out of “control” what SOP/s do you have in place to get it back in “control”? What visual displays and scorecards did you setup to monitor the key performance metrics? What type of behavioral motivation plan did you put in place to incentivize those that are most impacted by the change?
- **Review your agenda** – tell them what you told them, put up the “Ho-Hum Crasher Slide” as a reminder of what the end of the story was
- **Next Steps** – Review the Job Jar and indicate what you propose to do next and ask for support and input from your audience
- **Q&A and Close** – Watch your time, limit questions based on the time you have. Have a flip chart for questions that you will answer off-line. Thank them all for attending.
9. Presentations to Stakeholders, Customers, & Team

How To: Hints: Your presentation should always tell a story! Give the ending (the “Ho-Hum” Crasher!) away in the first couple of slides and then build the rest of the story around how you got to the ending. Tell them what you are going to tell them, tell them, then tell them what you said you were going to tell them. Don’t throw out a bunch of “rubber chickens”, be sure each feature has a benefit. Don’t forget to “show them the beef”. What’s in it for THEM! Make multiple copies of your agenda slide and as you go through the presentation put an agenda slide before each agenda section and highlight it so your audience can see where you are in the overall story. This allows you to create smooth segues and keeps your audience flowing with the logic path you setup in the first agenda slide. Your agenda bullets should follow a DMAIC roadmap. Only call it that if you choose to.

Get training in how to create and deliver effective presentations. Look at examples of good and bad presentations that have been presented to your various audiences. And, consider bringing in outside subject matter experts to help you get up the learning curve and accelerate your project.

Remember, you will have a diverse group of “thinkers” at each presentation. Review the “Art of Thinking” styles and be prepared! If there is any way to predict key attendees’ thinking styles ahead of time it will be in your best interest.

Be prepared before each presentation to decide how and who will get copies of what you present. Your presentations will become intellectual capital and proprietary. Obey the rules for disseminating. Don’t take it lightly. Control the value that you have created. Instead of giving it out freely, use it wisely. One trick is to setup follow up meetings with key attendees to go over the info instead of giving it to them. The PIP can be extremely valuable so plan accordingly.

At the end of this section you should be ready to take on your next project.
9. Presentations to Stakeholders, Customers, & Team

**Tool/s:**
- Project Charter
- CTQ Tree
- Data Collection Plan
- PIP
- Proficiency with Microsoft PowerPoint at least at Intermediate level

**Reference/s:**
- Consultative Selling (includes how to create a PIP) – M. Hanan, 1995
- The Six Sigma Memory Jogger – M. Brassard, et. al., 2002

**Other Books to Consider:**
- Presenting to Win – J. Weissman, 2008

**Statement/s to remember:**
- “To keep the idea/s alive, communicate successes often” – author unknown
10. Learning to Count

**Description:** By this time in your project/s you have **completed as least one project** that has helped you start up the steep learning curve to be proficient in successful, rapid change management. If you **brought in some SME’s** to help you then you have probably accelerated your learning and have moved up further on the learning curve than if you would have done your project without the SME help. **This section is presented as a “Stretch Goal” or could be considered the search and attainment of the “Holy Grail”**. Gathering data (numbers) and working with **numbers can be play as a tremendous advantage in favor** of your success and rapid time frames. The numbers start back at the beginning of your project when you begin to translate Primary CTQ’s into Secondary CTQ’s that have metrics associated with them. These metrics then have goals established (more numbers) along with time boundaries. You gather lots of numbers when you measure and analyze the current state. And then more numbers are added when you predict your future state, pilot the future state, implement the future state and audit the future state. That is a lot of numbers! **Getting those numbers to work for you is what “Learning to Count” is all about.** The **“Holy Grail” is finding ways to easily access the numbers and being able to formulate the numbers into a powerful story that supports your change efforts and proves that your change was indeed beneficial and met or exceeded your “customers” expectations.**

This module, like #9, is best assimilated by taking quiet time and reading through it a few times. The slides in this module are your Cliff’s Notes for how to perfect your change management skill & impact.
10. Learning to Count

I was fortunate enough a few years back to meet an author who was a lean practitioner in the fields of accounting and finance. At the time lean was just getting started in healthcare and was not that prominent in mainstream US manufacturing either. Lean in accounting? That was an unheard of thought. This author is Brian H. Maskell. He has now written 8 books on lean accounting practices. He takes a strong and valid position on getting your accounting and finance folks on your work teams and as stakeholders to truly understand the value that your change projects can produce. The best way to get their attention is with numbers, thus the importance of “Learning to Count”. Without their involvement in your project, when you go to request funds for capital and/or renovations you may face major roadblocks. Getting them involved early in your project will help accelerate your project and pave the way to a higher probability of obtaining project funds. At the end of this section you should be well up the learning curve and have a few projects behind you. Once you have perfected your skills within your lab it will be time to export your skills outside the walls of your lab and teach others within your institution. The experience you gain with your lab projects can provide the means for you to lead other change projects within your institution.
Once again if you want to accelerate up the learning curve with this section, bring in some SME’s. Take your metrics from your Secondary CTQ’s and funnel them down to 5 or less key performance metrics (KPM’s) that can act as early warning indicators for something going wrong with your new change. Agree with your team as to what level is acceptable (green), what range is marginal (yellow) and at what point it is unacceptable (red). If these KPM’s cannot be monitored in a real-time, passive manner, then create a process as to who gathers the data, who posts the data, what frequency it is posted and where it is posted. Be sure the process describes the action that should be taken if any metric goes yellow and what to do if it goes red. Conduct periodic reviews with your team and stakeholders about the values of these KPM’s. One of the best visual formats I have used in the past has been to display these KPM’s in the form of an analog dashboard gauge.
10. Learning to Count

KPM (CTQ’s) Visual Dashboard Example
10. Learning to Count

Ideally you would like to have these KPM’s be generated passively and real-time and displayed in your lab for all to see. This is being done sporadically today but is not mainstream yet. The biggest roadblock to having this occur is software. If you truly believe that these KPM’s which are derived from CTQ’s are critical to keeping your lab running on target then you will need to make this demand known to your IT folks, your IT and middleware suppliers and your equipment suppliers. We need to create KPM monitoring software as we did with Westgard rules for QC, thus the belief we shared with you that “CTQ’s are to Value as Westgard rules are to QC”. The best example I have recently seen is the referenced CLN article in the July, 2014, issue pgs. 14-15, “What Does Turnaround Time Say About Your Lab?” In this issue there is a description of a passive, real-time TAT electronic monitor. This is an article worth reading. Envision all KPM’s connected this way! Whether you post your KPM’s manually or passive, real-time electronically, the key is to do it. This will give you the information to show that your change was good and is being sustained. Now parlay that success into your next change challenge!
10. Learning to Count

“Easy to Collect-Easy to Manage Metrics” – S. Hood, Sept. 29, 2009, Lab Quality Confab (pdf available online by Google Search of “sandy hood lab confab”)

The Best example of Monitoring & Managing KPM’s (CTQ’s) that I have ever seen!

Easy to Collect-Easy to Manage Metrics

Sandra Hood MT(ASCP)SBB
Certified 6 Sigma Black Belt
Administrative Director
Riverside Methodist Hospital
10. Learning to Count

“Easy to Collect-Easy to Manage Metrics” – S. Hood, Sept. 29, 2009, Lab Quality Confab (pdf available online by Google Search of “sandy hood lab confab”)

Key Performance Metrics Example:
10. Learning to Count

10. Learning to Count

**Tool/s:**
Google Search of “Books written by Brian H. Maskell”
Slides showing the examples above

**Reference/s:**
Making the Numbers Count - B. H. Maskell, 1996
Practical Lean Accounting – B. H. Maskell, 2011
“Easy to Collect-Easy to Manage Metrics” – S. Hood, Sept. 29, 2009, Lab Quality Confab (pdf available online by Google Search of “sandy hood lab confab”)

**Statement/s to remember:**
“In God We Trust, All Others Must Bring Data” – author unknown
“CTQ’s are to Value as Westgard rules are to QC” – J. Ellis, 2014
Agenda – 10 Essentials of Successful, Rapid Change Management in the Lab:

1. *Learning to “Think”
2. *Learning to “See” the Opportunities
3. Prioritize the Opportunities – Make your Shortlist in Priority Order
4. Define Success for each Change (measure of Success, time frame, value
5. Pick your team (Stakeholders, Team Captain, Players)
6. Gantt your time line for the complete project (all steps of DMAIC)

LUNCH

7. *Learning to “Execute” your plan (detail out all steps of DMAIC)
8. Create a “Job Jar” of Future Changes as you go along but stay focused on current change
9. Presentation/s to Stakeholders, Customers, Team (possible PIP use)
10. *Learning to “Count”

Summary of Workshop & Closing Remarks

Interactive Session with Q&A
Summary & Closing Remarks

Remember the following highlights:

1) **Successful** – in the eyes of your customer, adding value, operational definition, measurement of success, time bound.
2) **Rapid** – 1st project 30 days or less, majority 90 days or less, max. 12 months.
3) **Change** – operational definition, must add value, measurement and time bound
4) **Management** = Leadership, YOU!
5) **Find SME’s to help you accelerate**
6) **R&R (Ready & Receptive)**
7) **5 Styles of Thinking** – what are you, what is your audience/customers?
8) **You are always selling!**
9) **I think I can, I think I can, I think I can!**
10) **4 Stages of Competence** – know where you and your team are.
11) **Core Competency or a Target for Outsource?**
12) **5 Why’s**
13) **Tools for Prioritization**
14) **Define Success** – Primary & Secondary CTQ’s, Metrics (KPM’s), Goal, Time Bound
15) **Pick Your Team for Success**
Summary & Closing Remarks

Remember the following highlights:

16) Gantt following DMAIC
17) Direct Observation is most accurate way to get real data
18) Make your Plan, Work your Plan
19) Communicate, Communicate, Communicate
20) Job Jar will locate your next opportunity
21) Ho-Hum Crasher – disclose the ending first and then explain how you got the ending
22) Tell a story, order by DMAIC
23) Go after the Holy Grail – KPM’s collected passively and real-time & displayed electronically color coded
24) Add an accountant/finance person to your team early on
25) CTQ’s are to Value as Westgard Rules are to QC

In Summary this written tutorial and the accompanying slides should assist you in any change management project that you encounter. We have applied the principles described in this workshop to our everyday projects over many years and have found them to be extremely useful in delivering successful, rapid change management initiatives. We hope you can benefit from our experiences and not have to go through trial and error to come up with a change management process. Contact us if you need help or advice. Good luck!
At the end of today’s Workshop you will know how to do this & what each line, color, section and number means as you progress through the “10 Essentials of Successful, Rapid Change Management in the Lab”
Interactive Session with Q & A

Change management is the application of a structured process and set of tools for leading the people side of change to achieve a desired outcome.

When change management is done well, people feel engaged in the change process and work collectively towards a common objective, realizing benefits and delivering results. (PROSCI)