Moving Beyond Heroics using Lean Thinking and a Lean Management System
Kim Barnas, Past Senior Vice President ThedaCare, and President Appleton Medical Center and Theda Clark Medical Center

Faculty, ThedaCare Center for Healthcare Value

Author, Beyond Heroes
ThedaCare as a Healthcare Delivery System – Where this all got started

- In 10th year of lean journey
- 6500 Employees
- 4800 employees affected by BPS so far

Appleton Medical Center

- 7 Hospitals, including a Cancer Center, Heart Institute, Level II Trauma Center, Stroke Center, Acute Rehab Unit
- 6 Behavioral Health Locations
- 3 Home Care Locations
- 2 Employer Health Locations
- 1 Skilled Nursing Facility
- 1 Senior Living Facility

Theda Clark Medical Center
ThedaCare

In the Year 2000

- 2 Hospitals, including a Cancer Center, Level II Trauma Center, Acute Rehab Unit
- 9 Physician Clinics
- 1 Behavioral Health Location
- 1 Home Care Locations
- 0 Employer Health On-Site Clinics
- 0 Skilled Nursing Facility
- 1 Senior Living Facility
- $400M Revenue

In the Year 2014

- 7 Hospitals including Cancer Center, Heart Institute, Level II Trauma Center, Stroke Center, Acute Rehab Unit
- 37 Physician Clinics
- 6 Behavioral Health Locations
- 3 Home Care Locations
- 39 Employer Health On-Site Clinics
- 1 Skilled Nursing Facility
- 1 Senior Living Facility
- 1,359,462 Patient Visits (2013)
- $1 Billion U.S. Revenue (2014)
• System Decisions – Deployed through Strategy Deployment
• Catch-ball from Operational Plans occurs at each level starting with the Strategic Plan (Influence)
• Standard Work, Improvement and Innovation (Leader and Clinical)
• Gemba at all levels
True North Metrics

Purpose: Measuring the health of the organization

- Safety
  - System Patient Safety Bundle
  - D.A.R.T

- Quality
  - Preventable Mortality
  - 30 Day Readmission

- Customer
  - Customer Loyalty Score
    - HCAHPS

- People
  - Engagement Index
  - Health Assessment Score

- Financial Stewardship
  - Operating Margin
  - Productivity
How ThedaCare Got Started…

The Lean Journey began in 2004

- Value Stream Analysis
- Rapid Improvement Events
- Action Plans
We learned how to use the Tools
A management system that aligns both vertically and horizontally an organization’s functions and activities with its strategic objectives.

Uses the PDSA process to develop a plan with precise goals, actions, timelines, responsibilities and measures.
The next step in the Journey:

The Business Performance System- A Lean management system
Todays Discussion

• How ThedaCare created and sustains a system of continuous improvement aligned with strategic goals

• Think about a model for cascading information effectively throughout the organization

• Implementing a system where employee coaching and mentoring can occur on a daily basis

• Explore the concept of building standard work for all leaders in gemba to support daily continuous improvement
Time

Human Development Value Stream: Respect for People

ThedaCare Improvement System: Lean Thinking & Tools

BPS: Leader Standard work & discipline

How we deliver improvement

Performance

Culture of Continuous Improvement
Reason for Action-2008

We are on a continuous improvement cultural transformation, and current systems for managing the business are not in alignment with new expectations.

- No one way to manage
- No way to measure performance
- No consistent way to problem solve
Goal

To develop our people to solve problems and improve performance.
True North Metrics (Board Approved)

3-5 year Strategic Plan (Board Approved)

System Strategy Deployed Drivers
Executive Team (A3)

Annual Strategic Plan Study and Adjust (Board Approved)

Divisional Operational Plan and Strategic Drivers (A3)

Point of Impact - Leader Standard work

Daily Stat Sheet
Daily Huddle
Leadership Team
Monthly Scorecard
Monthly Performance
A3 Thinking and Countermeasures
Leader Standard Work
Visual Management
Unit VSA
Kamishbai
Lean Management System
Leadership Skills for a Lean System

1. Assessing and taking risk
2. Mentoring and motivating people to achieve
3. Ability to recognize waste
4. Develop shared thinking among the team
Leadership Skills for a Lean System

(Continued)

5. Ability to persuade and influence
6. Use of a standard toolset (9 tools)
7. Discipline...rigorous discipline
8. Agility
The No-Meeting Zone
The Daily Stat Sheet
## Stat Sheet Connections

### VP/Director

<table>
<thead>
<tr>
<th>Performance Status</th>
<th>List Unit:</th>
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</thead>
<tbody>
<tr>
<td>Safety</td>
<td></td>
</tr>
<tr>
<td>What Patients/Families or staff Risks are you monitoring?</td>
<td></td>
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<tr>
<td>What EEG issues are you experiencing?</td>
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<tr>
<td>Quality</td>
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<tr>
<td>What Quality opportunities or concerns have you identified in the past week/month?</td>
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<tr>
<td>How are you integrating quality performance into daily work?</td>
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<tr>
<td>What are you learning from Leadership rounds?</td>
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</tbody>
</table>

### Manager

<table>
<thead>
<tr>
<th>CVS Weekly Stat Sheet</th>
<th>Mon</th>
<th>Tues</th>
<th>Wed</th>
<th>Thurs</th>
<th>Fri</th>
<th>Rev. 17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
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<tr>
<td>Safety</td>
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<tr>
<td>Who are those patients at highest risk for a fall?</td>
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<tr>
<td>Who is the most difficult patient to move on the unit?</td>
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<td>Who is at risk for bundle misses today?</td>
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<tr>
<td>Who are those patients at highest risk for a fall?</td>
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</table>
The Daily Performance and Defect Review Huddle
An Engaged Community of Problem Solvers!
The Monthly Scorecard
Use A3 Thinking
What is the problem (driver) we are trying to solve? Every driver must have an A3.
Title: Radiation Oncology Business Strategy

Sponsor: Greg Devine  
Leader: Kim Barnas  
Revision 18, Date: 01/28/09

1. Reason for Action:
The AFC program is a critical element of our comprehensive Cancer Center.

2. State:
   - Leading edge technology
   - Exceptional human talent incorporated into effective teams.
   - Decrease free processes
   - Customer focused culture
   - Requires exceptional service
   - The market has become more competitive putting TC at risk.
   - There are well organized, highly visible, and motivated competitors seeking our market share.
   - Our customers are more

3. Target State: Recognized in market as destination of choice for quality outcomes, cost, technology, and patient experience

4. Gap Analysis:
   - Problem Statement
   - Root Cause (based on CEDAC)
   - Lack of MD and Leadership Alignment
     - Not shared service vision
   - Lack of resources
     - CEDAC resource is shared among multiple programs
   - Delivery of Services across continuum disjointed
     - No single point of accountability
   - Our cost and outcomes are not transparent
     - No current KPI to measure outcomes realtime

5. Solution Approach:
   - Problem Statement
   - Root Cause
   - Countermeasure
   - Lack of MD and Leadership Alignment
     - Not shared service vision
   - Lack of resources
     - CEDAC resource is shared among multiple programs
   - Delivery of Services across continuum disjointed
     - No single point of accountability
   - Our cost and outcomes are not transparent
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6. Rapid Experiments:
   - Experiment
   - Goal
   - Methodology
   - Results
   - Conclusion

7. Completion Plans:
   - What
   - Who
   - By When
   - Complete
   - Status

8. Confirmed State:

9. Insights:
   Technology is only as good as the person operating the machine.
   Manitowoc Holy Family has joined St. V group – we will continue to look at new opportunities.
Monthly Performance Communication Diagram

Senior Leadership Team Monthly True North Review

- Reps from division leadership teams and the Senior Leadership Team meet together following defined standard work to discuss the division scorecards as they relate to strategic deployment and True North.

Division Leadership Team Monthly Performance Review

- Division leadership meets together following defined standard work to discuss their scorecards as they relate to division drivers.

VP or Director Leadership Team Monthly Performance Review

- VP or director meets with manager team following defined standard work around VP or director scorecard.

Manager Leadership Team Monthly Performance Review

- Managers meet with leadership team following defined standard work around team scorecard.

3rd Thursday of Every Other Month

3rd Monday of the month

6th to 8th Business Day of the Month

4th or 5th Business Day of the Month

… Repeat for each VP or director

… Repeat for each manager

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Categories of Standard work

• Clinical Standard Work
• Tactical Leader Standard Work
• Calendar based Standard Work
Leader Standard Work

☑️ Leaders must teach
☑️ Leaders must observe
☑️ Leaders must coach
☑️ Leaders must help teams identify improvement opportunities
Example of Executive Coaching
Examples of Leader Standard Work

- Daily Stat Sheet
- Daily Performance Review Huddle
- Leadership Team and Scorecard
- A3 and PDSA thinking
- Monthly Scorecard Review Meeting
- Process Observation Calendaring (kamishibai)
Kamishibai….Purpose: To observe and manage standard work.
Managing to Establish Standards (Kamishibai)
Visual Management
Area/Unit Improvement Center

Owned by the Manager and their Team

PDSA

creates development opportunities for leaders and staff
Begin the Dialogue

- Create and sustain a system of continuous improvement aligned with strategic goals
- Cascade information effectively throughout the organization
- Implement a system where employee coaching and mentoring can occur on a daily basis
- Build standard work for all leaders in gemba to support daily continuous improvement
Questions
Beyond Heroes

A Lean Management System for Healthcare

Kim Barnas
with Emily Adams

Forewords by Jim Womack and John Toussaint, MD

Download a sample chapter at: createvalue.org/beyondheroes