Change Management & Lean
This Session Will Cover

- What is Change Management?
- Reactions to Change
- Kotter’s 8 Step Process to Change
- Introduction to the principles and benefits of Change Management.
- Create a common understanding across the organisation.
- Overview of skills & tools which can be applied immediately.
- Understand how Change Management needs to be used throughout the organisation to drive continuous improvement.
- How to identify waste
- An overview of different Improvement Tools
- Continuous Improvement
What is Change Management

Change Management is about moving from a current state to a future state...

Current State

Future State

Successful Change Management is about achieving the future state ASAP whilst ensuring it is sustainable

AND reducing the (almost inevitable) slump in performance during this change process

Slump in performance during change
Reactions to change

Some People
That’s Great!!

OR

Oh No!!

More People

Pro
Neutral
Resist
Change, however well planned, is challenging.

- People will usually fall into one of the four boxes.
- There may also be resentment and anger.

Unhappiness is generally developed due to a previous bad experience with change.
What is Required?

- NHS organisations are becoming increasingly complex
- Patient expectations continue to increase
- Change for the better is now normal practice

- Successful change requires successful:
  - Planning
  - Leadership and Delivery
  - Measurement
    (and continuous improvement)

Change Management needs a structured process...
Kotter’s 8 Step Process to Change

1. Create a sense of urgency
2. Create a guiding coalition
3. Develop a vision and strategy
4. Communicate the change vision
5. Empower people for broad change
6. Generate short term wins
7. Consolidate gains and produce more wins
8. Anchor new approaches in culture

Successful Sustainable Change

John Kotter; Leading Change, 1996
Professor at Harvard Business School
New approaches inevitably mean CHANGE.

If one of the five elements are missing change will not be sustained.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Structure</th>
<th>Systems</th>
<th>Capability</th>
<th>Culture</th>
<th>= Sustained Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>CONFUSION lack focus, competing priorities &amp; agenda</td>
</tr>
<tr>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>ANXIETY lack of organisation</td>
</tr>
<tr>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>NO TRACTION Poor use of resource</td>
</tr>
<tr>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
<td>FRUSTRATION inability to execute</td>
</tr>
<tr>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>NO OWNERSHIP no commitment</td>
</tr>
</tbody>
</table>
Commitment from senior levels is required...always.
Clear & easy to understand reason for the change is required.
Expect the doubters, cynics, resistors – address the “me” issue.
Enable teams and leaders to support each other.
Create early success, keep up the momentum.
Celebrate success and accomplishments.
Have a structured change process.
Communicate effectively.
Plan accordingly
...and stick to it!!
Ensure sustainability.
Our Iceberg Is Melting

‘Our Iceberg Is Melting’
John Kotter
Service Improvements
Tools
The Benefits

Improve

- Quality
- Efficiency
- Patient Focus
- Flexibility
- Value added
- Activity
- Performance
- Safety

Reduce

- Waste
- Cost
- Complaints
- Incidents
- Duplication
- Unnecessary Tasks
How to Identify Waste

The 8 Wastes

- Transport
- Defects
- Resources
- Inventory
- Over-processing
- Waiting
- Motion
- Over-production
<table>
<thead>
<tr>
<th>Waste Type</th>
<th>What it is</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td>An activity involving moving/transporting an item, information or person (patient)</td>
</tr>
<tr>
<td>Resources</td>
<td>Underutilisation of time available or skill sets of personnel/team</td>
</tr>
<tr>
<td>Inventory</td>
<td>Excessive stock or data</td>
</tr>
<tr>
<td>Motion</td>
<td>Personnel Bending/ergonomic issues</td>
</tr>
<tr>
<td>Waiting</td>
<td>Waiting for a decision or step in a process/pathway</td>
</tr>
<tr>
<td>Over Processing</td>
<td>Too many authority levels or excessive steps in a process/pathway</td>
</tr>
<tr>
<td>Over Production</td>
<td>Producing more than is needed</td>
</tr>
<tr>
<td>Defects</td>
<td>Below standard, an abnormality, incorrect</td>
</tr>
</tbody>
</table>
Planning

- Identify key stakeholders
- Establish the Current Situation
- Discuss proposed improvements
- Identify priorities
- Set improvement targets
- Consider impacts
- Establish scope / boundaries
- Agree timescales
Process Mapping is a technique which enables a team to **see and understand** the start to finish of an activity/pathway or process, broken down into **ordered logical steps** to:

- Visually understand what is currently happening
- Interrogate and challenge current practices
- Determine where improvements can be made, remove waste
- Understand the impact of current practices/future changes
Practical Problem Solving is a methodology that uses several tools and techniques to:

- **Grasp the Situation**: Grasp the situation
- **Containment**: Implement successful countermeasures
- **Breakdown the Problem**: Collect data - where, what, how?
- **Point of Occurrence**: When does it occur?
- **Cause & Effect Analysis**: Identify all the contributing direct causes of the prioritised problem
- **Root Cause Analysis**: Root cause? – “5 Why’s”
- **Countermeasure**: Timely robust fix!
- **Follow up and check**: Check & test
- **Standardise**: Prevent further occurrence!

**PLAN**

**DO**

**STUDY**

**ACT**
5S – Workplace Organisation

**SORT**
Keep only what is necessary in the workplace

**SET**
‘A place for everything and everything in its place’

**SHINE**
Clean the work area so that it is clean and tidy

**STANDARDISE**
Agree and set standards for consistently organised workplace

**SUSTAIN**
Maintain and review standards
Standardisation

- Standardisation enables everyone to have a common understanding

- Choosing the best method from many different ones and then using it repeatedly

- Communicating the current 'best method' to do work so that everyone knows what to do

- Allows changes and improvements to be implemented in a controlled manner
Standards can be presented in many forms:

- Visual aids
- Documents
- Photos
- Templates
- Labelling

**Office Housekeeping Standard**

**End of Day Check**
- Clear desks
- Clear windowsills
- Windows closed
- Mugs cleaned and put in cupboard in kitchen
- Clear meetings table
- A3 paper in the printer
- All computers switched off
Visual Management

Visual Management is a lean tool which enables everyone to quickly see and understand:

- What is happening in the workplace
- Understand if an area is meeting its performance / standards
- Enable timely decisions to be made

“What gets measured visually gets managed in real time”

- **Visual Controls** - Provide a quick command or warning
- **Visual Displays** - Share information
- **Visual Metrics** - Demonstrate if targets are being met or not
Visualisation allows information to be provided to everyone in the minimum amount of time allowing for speedy and appropriate improvement activity...
Often the ‘study’ and ‘act’ do not happen.

- Establish a baseline
- Identify priorities
- People centred
- Go-look-see
- Structured problem solving
- Set improvement goals and standards

- Monitor and measure
- Find and fix
- Document results
- Audit
- Go-look-see

- Implement actions
- Make changes
- Communication
- Engagement

- Evaluate
- Sustainability
- Apply lessons learnt
- Modify as necessary
The Lean Temple

LEADERSHIP
TRANSFORMING HEALTH CARE

CONTINUOUS IMPROVEMENT

JUST IN TIME
FLOW

IN QUALITY

5S

STANDARDISATION

VISUAL
MANAGEMENT

PROBLEM SOLVING

PLANNING

Isle of Wight
NHS Trust
Next Steps

- Identify waste in your areas – keep a list, check back
- Identify areas for improvement
- Share your learning with your colleagues
  - Ask them to book on this session
- Come back to us for further support