

Guest Consultant Donald Tex Bryant on Plan-Do-Check-Act



Recently I was talking to one of my clients about self-improvement. I asked him, "How many people get up in the morning and think about how they could be better today than they were the day before?" He answered, "Not enough." Later as I considered his answer, I agreed that many do indeed live lives that lack direction and purpose, just getting by day to day, trying to survive their challenges.

In some ways I think that these conclusions also apply to businesses, including healthcare. Many organizations do not try or do not understand how to improve outcomes, whether a service or product for their clients. They do not keep a focus on their mission and strategic plan. Rather, they face their challenges in a rather haphazard fashion, sometimes succeeding but often failing. For instance, from a recent poll by the Medical Group Managers Association, most of their member sites have not checked to see if they are compliant with the new HIPAA standards that were to be in place on January 1, 2012.

Some businesses do focus on being a better organization each day and know how to solve their challenges. Many of these organizations have tools and processes which they consistently employ to help them improve, such as Total Quality Management and Lean Six Sigma. At the heart of each of these is the **Plan-Do-Check-Act** cycle (PDCA). The PDCA cycle can be implemented as a problem solving technique by most organizations with some brief training or study. There are many excellent books and articles that focus on this problem solving approach; a good source of them is the web site of the **American Society for Quality**. Short training sessions with experts can help a staff

achieve fluency in its use.

I will briefly describe and illustrate the Plan phase of PDCA in the remainder of this article. It can be used to solve challenges such as the implementation of an EHR, implementing evidence based practices, and designing processes which improve the outcomes for your patients while helping staff and physicians find more time to get important things done, such as spending more face time with patients.

Know Your Goals.

The first thing to identify is your goals. Do you want to improve the outcomes for patients with chronic diseases? Do you want to find more time to do things you deem important in your practice, such as creating a positive work environment? Some goals are dictated by challenges forced upon providers by outside organizations, such as using ePrescribing.

Prioritize Your Challenges.

Leaders in management and senior physicians should work on challenges that have an impact on more staff, which are more complex and which may require greater funds to solve, though high costs can sometimes be avoided. For instance, the leadership team would be responsible for the adoption of EHRs. Other staff can focus on challenges which affect them but are not readily apparent to all staff. For instance, the receptionist, front office staff and office manager at a small ambulatory site can work on organizing supplies and making sure that there are no unexpected disruptions in their availability.

Once staff and physicians have identified the challenges it should prioritize them. Focus first on those that affect patient safety and outcomes as well as the bottom line.

Form a Team to Design a Solution.

Very few challenges can be solved by just one staff person effectively. Thus, it will be necessary to form a team comprised of staff who are currently involved with the challenge. For instance, in the case of 5010 an IT staff person or staff member in charge of software, office manager, physician, and billing staff should be involved at a medium sized primary care site. A manager or physician should identify a leader of this team. This person will be responsible for the work of the team and for the implementation of the plan that it develops. It is very important that one person be in charge and responsible for the outcomes. It is not necessary for the leader to be a senior staff member, just someone who is respected by other staff and is energetic.

Collect Data.

How will you know if you are advancing towards your goals? You should collect data! First decide what you will measure. If you are adopting ePrescribing, you would want to see how much time each day is spent by staff and physicians providing prescription services, including time taken for refills and for faxing back and forth to pharmacies. Then, as you implement an ePrescribing system, measure how much time these services take at various stages of implementation. As staff become more fluent with the software and as they develop new workflows, the time taken should decrease significantly.

Design a Plan.

The team working on the challenge should create a document which lists the goals of the of the PDCA project, who is responsible for the project, the steps to take to reach the end and a timeline for completion. If the project is large, I would advise breaking it into smaller, sequential projects

that are easier to manage and easier to achieve. For instance, in the adoption of an EHR the first project would involve research into finding ones that meet the needs of the staff. After an EHR is purchased, the second cycle of the PDCA project would be the implementation of some of the features of the EHR into the daily work of the physicians and staff.

Plan-Do-Check-Act is a rational process that businesses can effectively use to solve their challenges. It is based upon the scientific method, which is the basis of much of the work of medicine. One physician recently described on KevinMD.com that he uses this approach frequently with his patients. It makes sense, then, to adopt this technique for the improvement of the services and work of all staff at a healthcare site. If you are not using such an approach now, you should Plan to do so.

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Grownup Back to School: Make Fall a Time to Reorganize Your Virtual Backpack and

Pencilbox

LifeHacker had a **great post** today that I thought was worth sharing. It's about using the change of seasons as a catalyst to get yourself reconnoitered and back on track. The article advises you to:

- De-clutter your computer
- Empty your Inbox – he uses the trusted trio of *Followup*, *Archive* and *Hold*. I like *Followup*, and *Do Not Delete* and *Archive*.
- Reorganize your paper filing cabinet
- Teach yourself keyboard shortcuts (**My son taught me Ctrl+C (copy) and Ctrl+V (paste) not too long ago and I have no idea how I ever did anything without these two friends – try them instead of using right click or tool bar icons and you might be surprised how automatic it becomes and how fast it is*)
- Consolidate your email addresses, phone numbers, and calendars

Here are my additions to the list:

- Learn three things about Excel that you continue to do the long/hard way because you're too busy to learn the shortcut (yes, I'm talking to myself here.) Try **this site, or this one.**
- Catch up on your shredding (at home I have a box of to-do shredding, and a to-be shredded drawer that needs emptied – yes, I'm talking to myself again.)
- Reorganize your online filing cabinet – **here's a great beginner article about files and folders**, and here's a short video tutorial from Expert Village on **organizing files in Windows.**
- Delete unneeded email or understand archiving – here's a **website** with information on using AutoArchive in Outlook (me again.)

What's your secret weapon to getting/staying organized and ahead of the information deluge?