Utilizing LEAN Tools to Develop and Test Standardized Work in a Residency Clinic

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BACKGROUND / INTRODUCTION
- High functioning primary care residency clinics share characteristics including engaged leadership, team-based care and meaningful, data-driven quality improvement.
- During leadership vacuums (medical, clinical, operational), residency practices are especially vulnerable to breakdowns in standardized work, performance measurement and improvement activities.

SETTING
- Urban family medicine residency program clinic within a large multi-hospital health network
- 8800 patient empanelment

METHODS
Utilizing a LEAN A3 problem solving approach, a multi-level team of faculty, clinical and clerical staff, and non-practice colleagues conducted:
- Identification of gaps and breakdowns
- Root Cause Analysis
- Countermeasure intervention design
- Evaluation design
- Pilots (forms, care team alignment, and pre-visit planning)

AIM
- Develop time saving interventions
- Strategize implementation

PLAN
- What barriers impacted implementation?
- What sources haven’t been resolved?

DO
- Roll-out to cohorts of practice staff
- Intentional use of intervention features

CHECK
- Staff feedback
- Review tracking sheets

ACT
- What barriers impacted implementation?
- What sources haven’t been resolved?

INTERVENTION

RESULTS
- By the second week of PDCA in the first teamlet, previst planning was done on 100% of daily charts
- Forms were preparded for physician in 78% on sessions
- Co-located teams felt positive about the change on several satisfaction measures (performed weekly)

DISCUSSION
- Teamlets prefer the post-PDCA state
- Teams took greater ownership of their schedules, their forms and their patients.
- Patients are starting to notice and request teamlet staff
- Staff awaiting teamlet assignment are starting to engage with their daily clinician more effectively, asking for help, because they see teams doing it
- When the process seems too big to tackle, the driver diagram helped identify areas of focus and achievable interventions.

CONCLUSION
Keys to success:
- Avoid analysis paralysis
- Don’t wait for perfect team or perfect plan
- Start small
- Encourage teammates to try their own things
- Address tribal leaders and water cooler conversation

Use the change process to create standard work
- Becomes onboarding material for new hires
- Creates sustainability