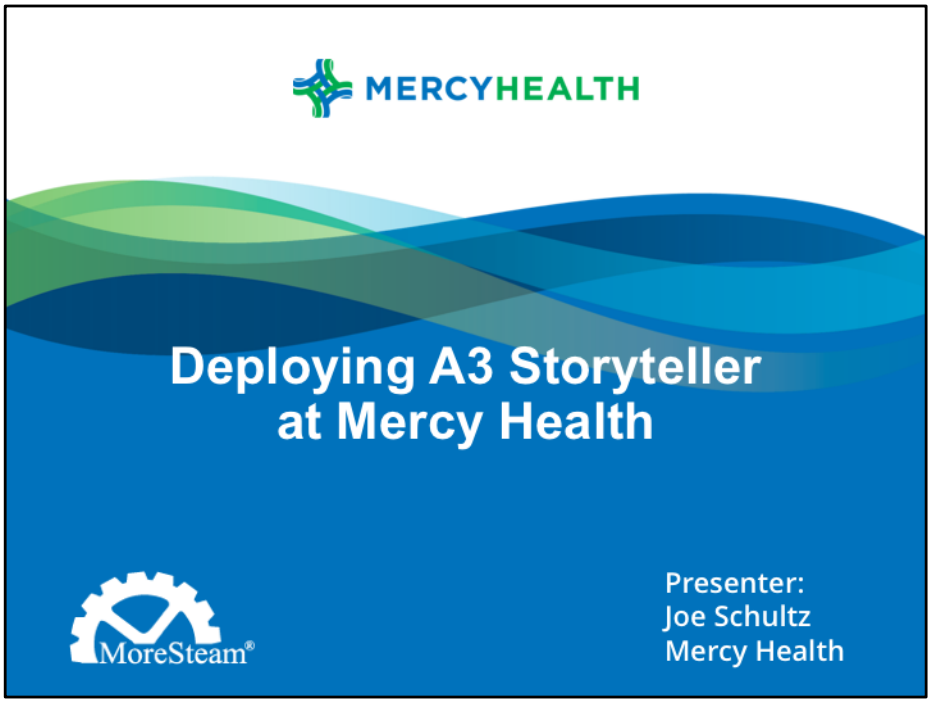
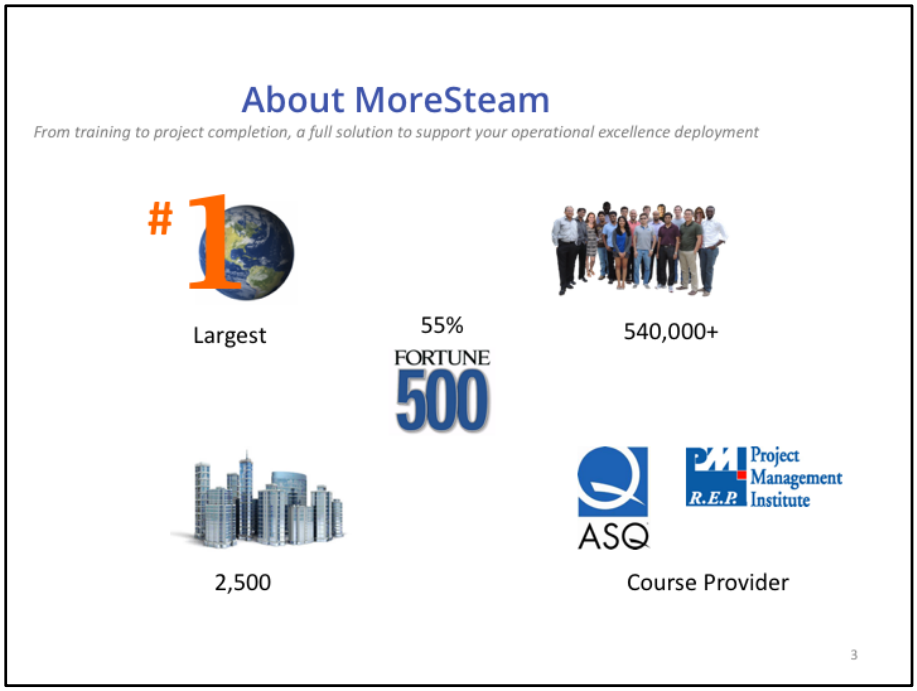


HELLO EVERYONE! Thank you for joining our webcast featuring Mercy Health's deployment of A3 storyteller.

My name is Ellen Milnes, Director of Marketing for MoreSteam who sponsors this series of Master Black Belt webinars.

I'll be acting as the program moderator for this session

and have a few items to cover before we get started.



First of all, a couple words of introduction about MoreSteam.

The term "*more steam*" is an old expression referring to the practice of engineers of adding fuel to their steam engines to achieve greater drive, speed and success.

In the same vein, our company has worked ceaselessly to deliver an ever-expanding catalog of e-Learning courses and online software tools to fuel the success of continuous improvement deployments.

- MoreSteam is a privately-held company –founded in 2000- headquartered near Columbus, OH.
- We've now trained over half a million professionals for

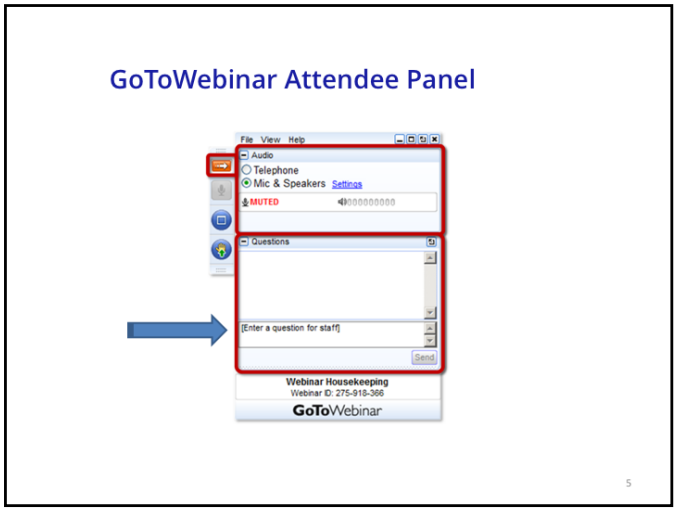
thousands of corporate customers.

- And have a number of university partners across the country (such as Ohio State, Notre Dame, CalPoly, Texas A&M, George Washington and a number of others).
- Our courses are also offered by professional organizations such as ASQ and PMI.

Here is a small sampling of some of our larger global customers.

You'll notice a broad representation across a variety of industries: manufacturing, financial & healthcare services, and also university operations.

We're HONORED to support our clients' continued success and YOUR personal, professional development with programs such as today's webcast.



A couple administrative notes before I turn it over to Joe:

•Please enter your questions as they arise by typing in the QUESTION block of the Attendee Control Panel -- We'll **pause midway** to check for questions and then **conclude** with a few more minutes for questions.

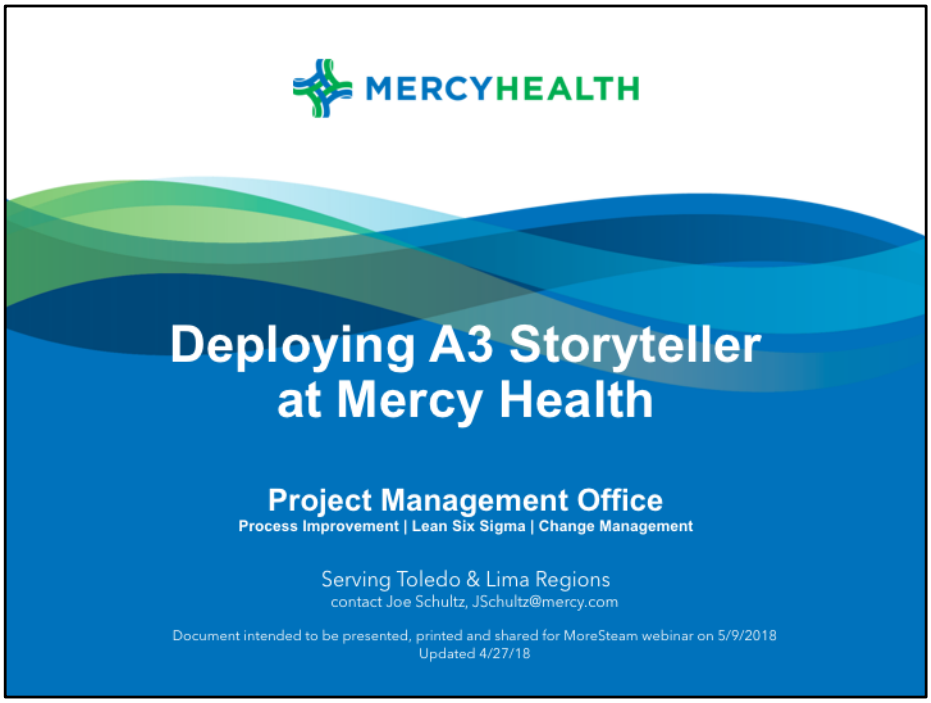
If you're interested in keeping a copy of today's slides or possibly sharing the recording, the materials will be posted to our webcast library on the MoreSteam.com website. ……

Now, it is my pleasure to **introduce today's Speaker --- Joe Schultz.**

- Mercy Health is the largest health care system and 4th largest employer in Ohio, contributing over $10B to the state economy.
- Joe leads teams across eight hospitals in multiple regions using lean, six sigma, change management, and project management tools. Previously, he held leadership positions at Nationwide Children's Hospital and Parkview Health.
- In addition to his “day job”, Joe also teaches Lean Six Sigma at the University of Toledo College of Engineering.

- Joe is an Ohio State graduate *(twice over)* earning his bachelor's degree in Molecular Genetics and his master’s in Biophysics.

- Thank you, Joe, for sharing Mercy Health's journey to tell process improvement stories in an impactful way using an A3 Storyteller.


MERCYHEALTH
Deploying A3 Storyteller at Mercy Health
Project Management Office
Process Improvement | Lean Six Sigma | Change Management
Serving Toledo & Lima Regions
contact Joe Schultz, JSchultz@mercy.com
Document intended to be presented, printed and shared for MoreSteam webinar on 5/9/2018
Updated 4/27/18

Phase 1: Telling a Story

Burning Platform

Change is HARD.

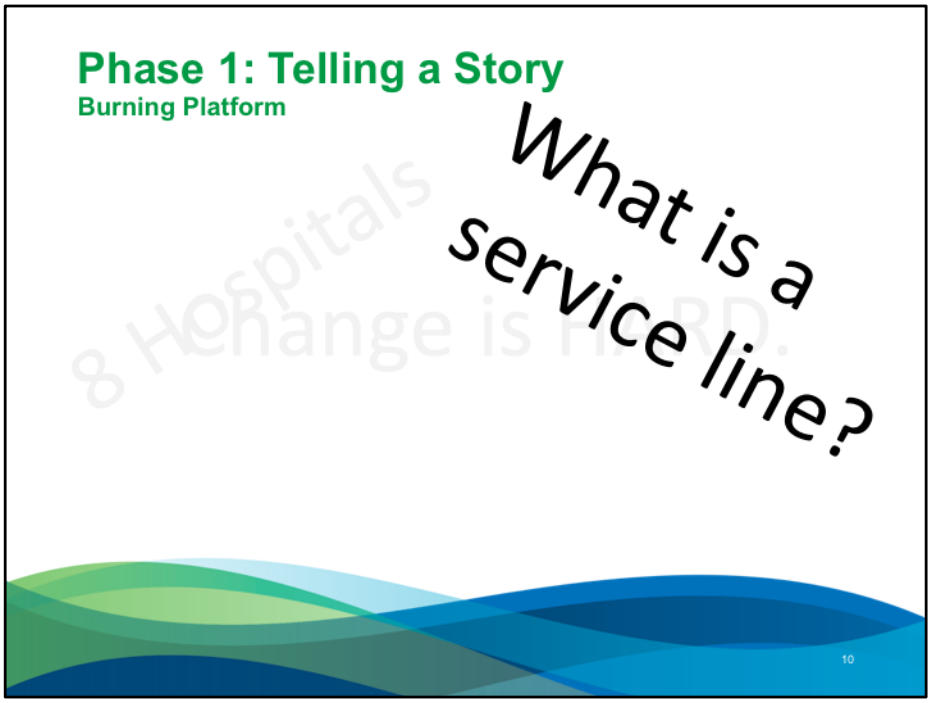
Phase 1: Telling a Story

Burning Platform

8 Hospitals

Change is HARD.

9


Phase 1: Telling a Story
Burning Platform
What is a service line?
8 Hospitals
change is hard.
10

Phase 1: Telling a Story

Burning Platform

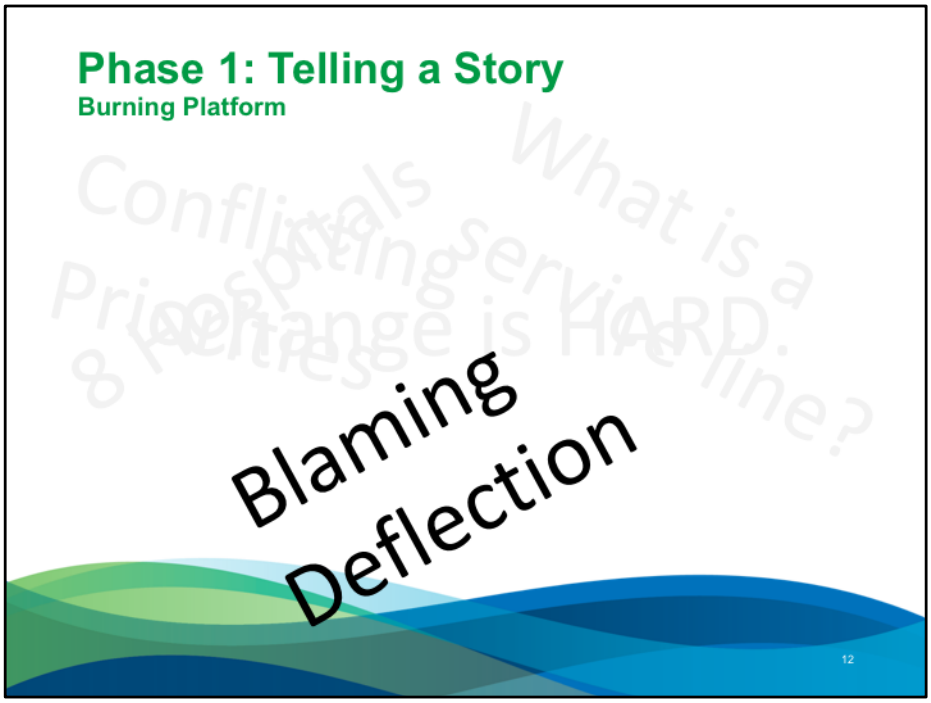
Conflicting Priorities

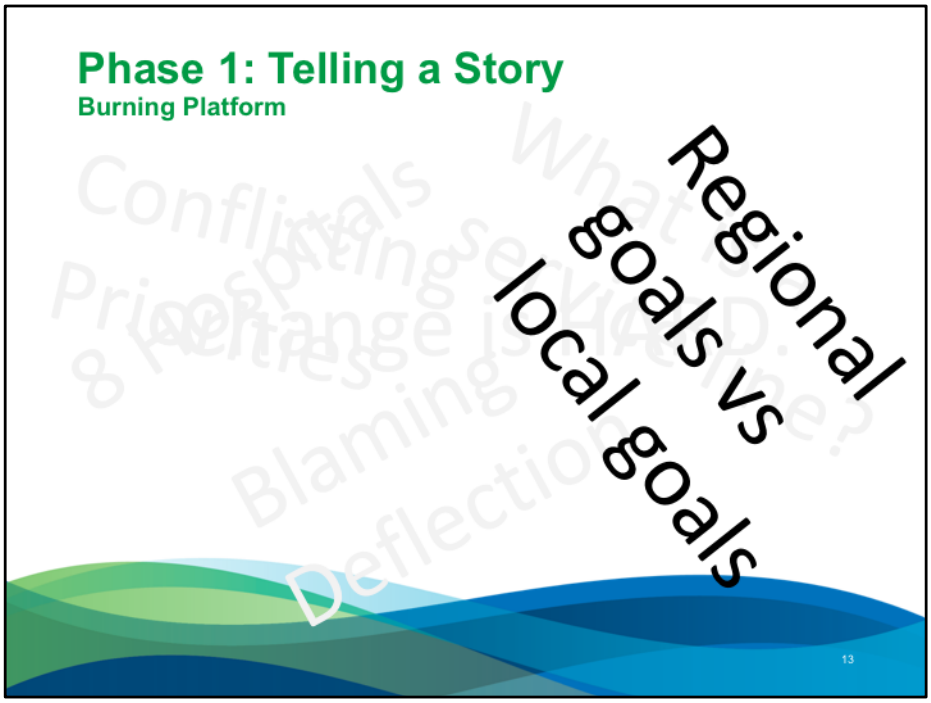
What is a service line?

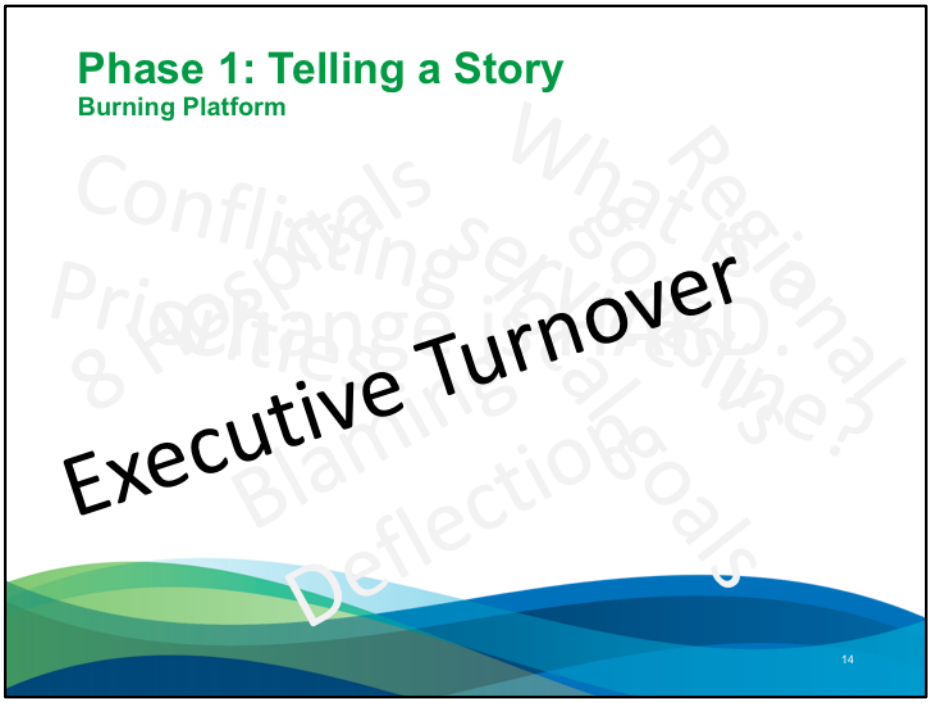
8 Hospitals

Change is HARD.

11


Phase 1: Telling a Story
Burning Platform
Blaming
Deflection
12


Phase 1: Telling a Story
Burning Platform
Regional goals vs local goals
13


Phase 1: Telling a Story
Burning Platform
Executive Turnover
14

Phase 1: Telling a Story

Burning Platform

Budget Reductions

Phase 1: Telling a Story
Burning Platform
CHANGE
HAPPENS
16

Phase 1: Telling a Story

Burning Platform

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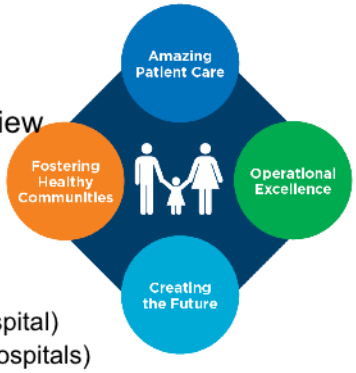
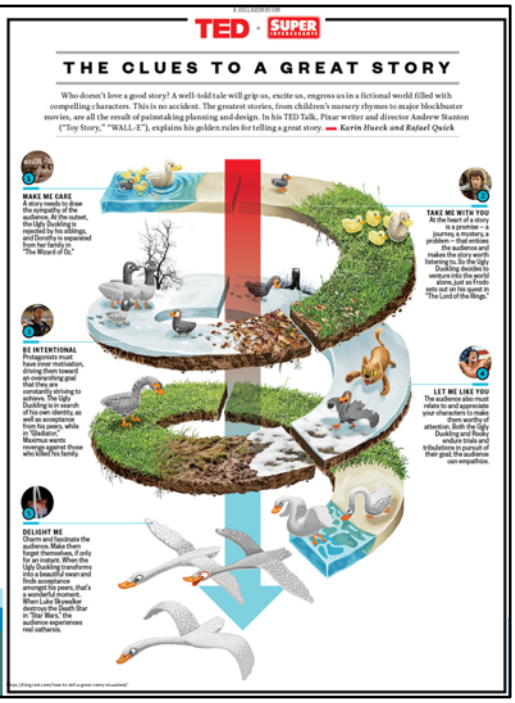
Agenda

- Storytelling
- Biosketch
- Mercy Health Overview
- Project Management Office Overview
- Project Charter
- Building an A3 YOUR way
- Our Journey
  - Phase 1: Departmental Pilot
  - Phase 2: Lima Mkt Deployment (1 hospital)
  - Phase 3: Toledo Mkt Deployment (7 hospitals)
- Key Considerations



Phase 1:
Telling a Story
Power of Storytelling

1. Simplicity
2. Unexpectedness
3. Concretness
4. Credibility
5. Emotion
6. Stories



Biosketch

My Story

NATIONWIDE CHILDREN'S

When your child needs a hospital, everything matters.℠

PARKVIEW HEALTH

MERCY HEALTH

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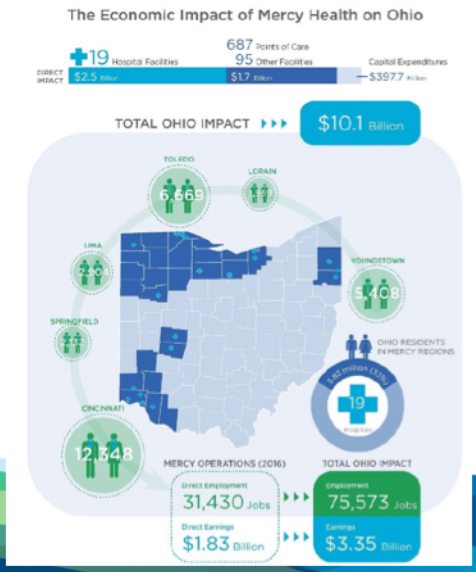
Mercy Health
Our Story

A Catholic healthcare ministry serving Ohio and Kentucky

- A legacy – founded by women religious 160 years ago
- A healing ministry – 5.9 million patient encounters a year
- A quality leader – Top quintile system rated by Truven Health Analytics
- A community benefit leader – Nearly $1 million a day
- A statewide leader – Largest health system in Ohio with $10+ billion economic impact and nearly 500 points of care
- Upcoming Potential Merger with Bon Secours (43 hospital system) for fifth largest Catholic Health system in the country
  - http://www.modernhealthcare.com/article/20180221/NEWS/180229982

Economic Impact

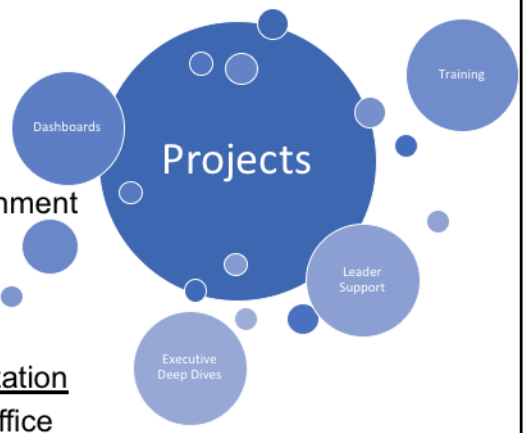


About the Project Management Office

- Lean | Six Sigma | Change Management
- Founded 11/2017
- Commissioned by Regional CEO
- 5 Project Managers/Senior Project Managers
  - Multidisciplinary Team: Physician, Nurse, Marketing, Scientist, Business/Administrative Fellows
- Reports through Regional Executive Structure
- Multi-regional: Toledo and Lima markets

What does the PMO do?

Lean
Six Sigma
Change Management
Project Execution
Strategy/Goal/Ops Alignment
Process Improvement
Leader & Staff Training
Quality Improvement
\+ High Reliability Organization
Project Management Office



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Problem Statement / Current State

Change Happens. Change is Hard. There is an opportunity to reduce time spent interpreting information on initiatives/projects and create alignment around Key Performance Indicators. There is an opportunity to confirm Key Performance Indicators are aligned with system strategy that translates to regional strategy that cascades to local hospital strategy.

SMART GOAL/AIM

Create standardized “one page” tool to communicate change and updates and deploy across 8 hospitals by 3/1/2018

Champion

Original: Regional Vice President Bus Dev and Service Lines
Current: Regional Chief Executive Officer/System Senior Vice President

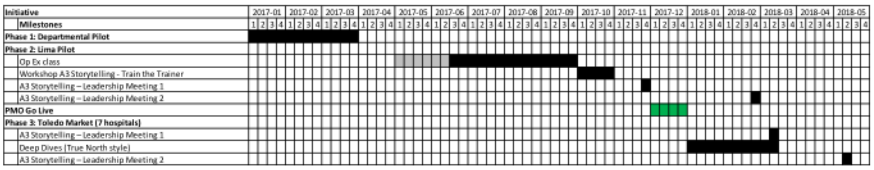
Process Owner

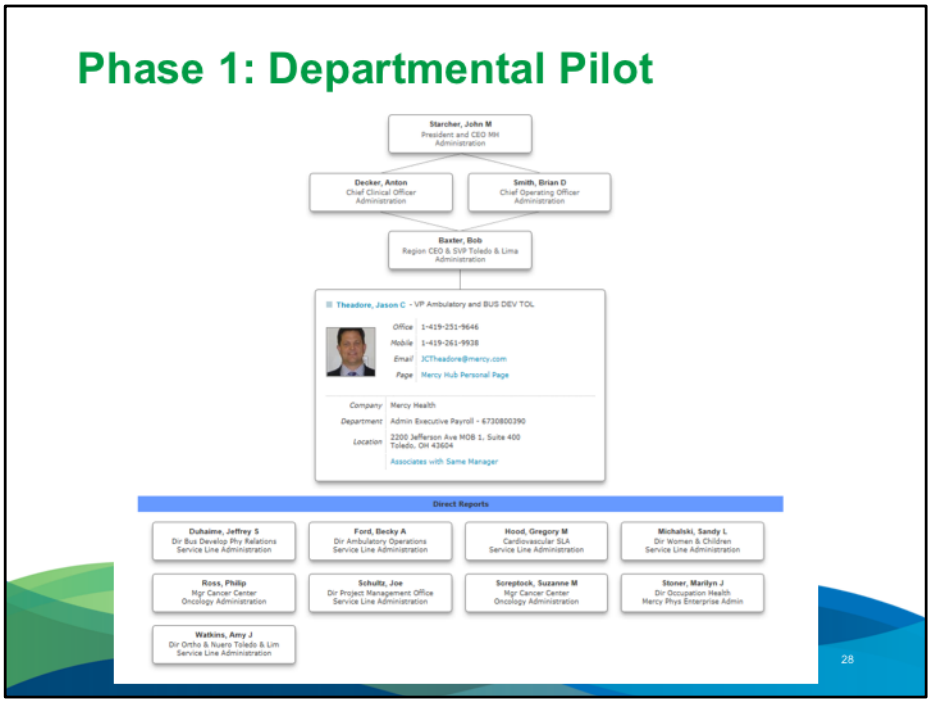
Regional Chief Operating Officer

GANTT

Deploying A3 Storyteller at Mercy Health

Create standardized "one page" tool to communicate change and updates and deploy across 8 hospitals by 3/1/2018
updated: Joe Schultz on 4/27/18





Objectives

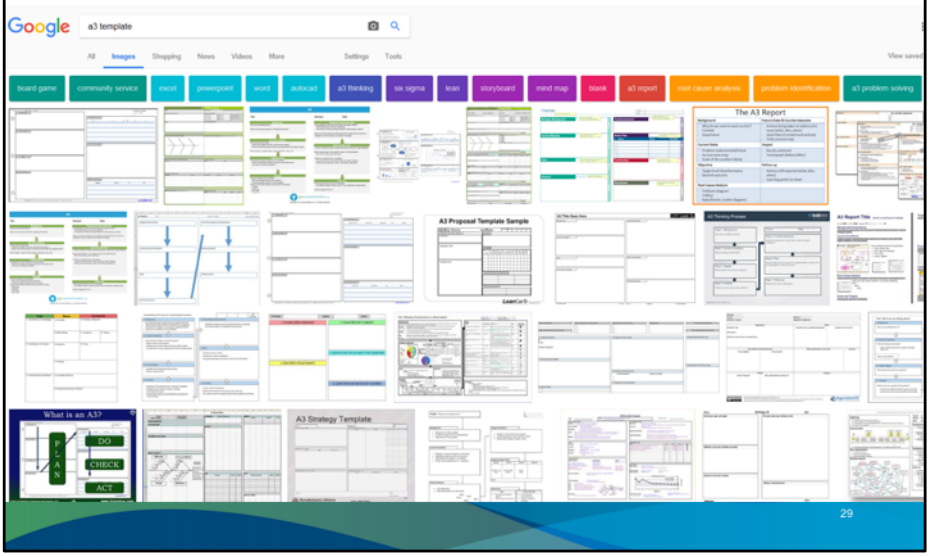
- Create tool for 1 page summary
- Keep it Simple Simon
- Minimize need for advanced excel/powerpoint skills
- Minimize leaders perception of “adding 1 more thing” to their plate
- Minimize “flavor of the week”

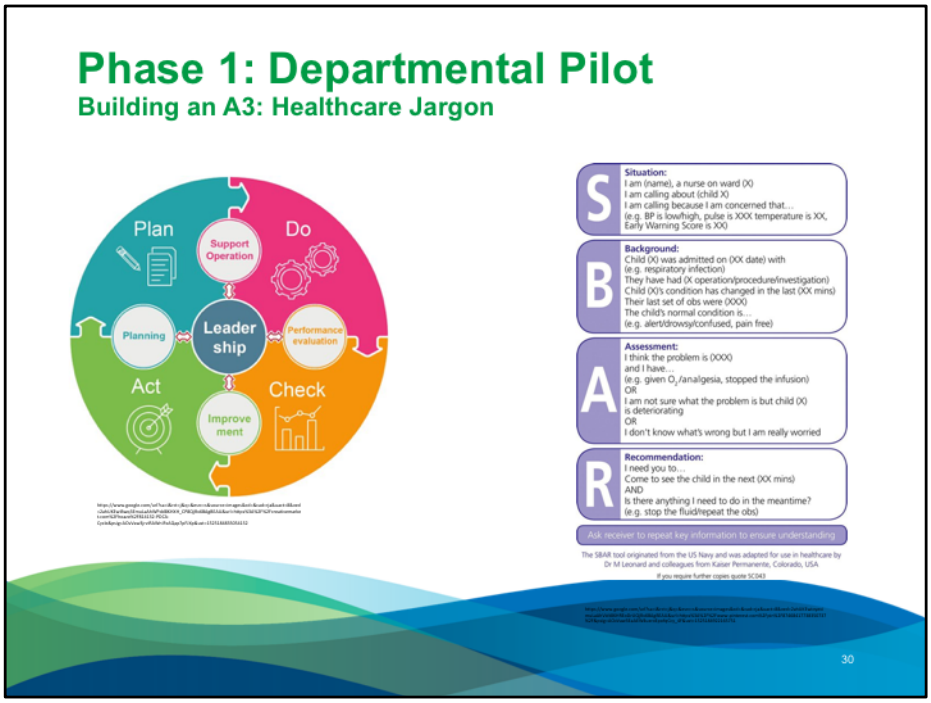
Intended Users

- Leaders at all levels
- Shared with front line staff

Pilot with the regional Service Line Administrator team

Phase 1: Departmental Pilot
Building an A3: Too many templates!





PDCA/PDSA

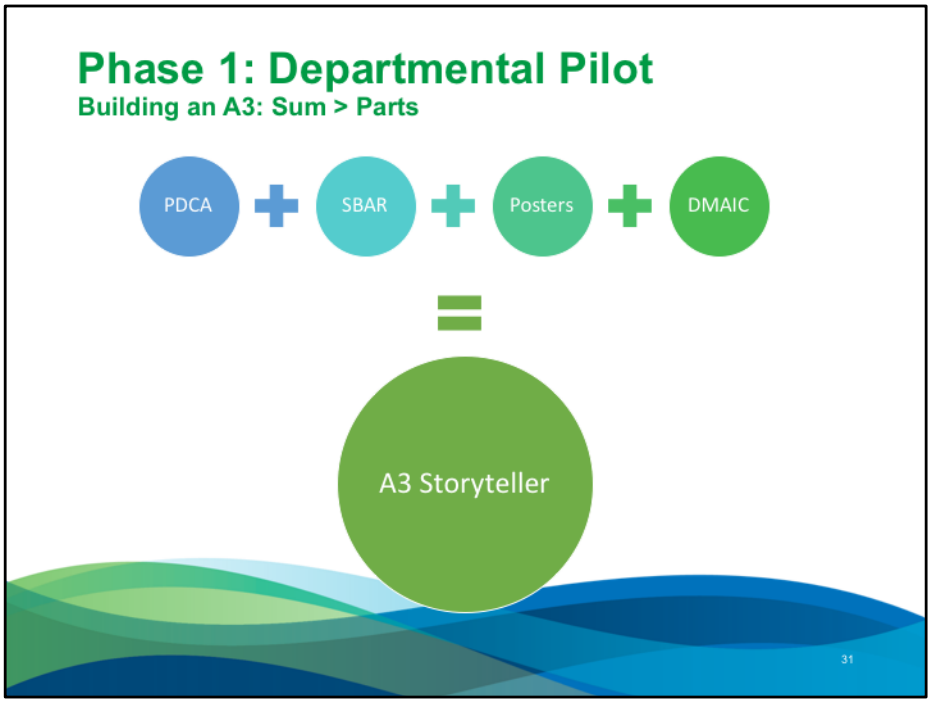
- Plan Do Check Act (PDCA) & Plan Do Study Act
- Founded by W. Edward Deming (father of quality control) also known as Deming cycle wheel/Shewhart cycle for continuous improvement
- Popular with quality improvement initiatives and training programs

SBAR

- Situation Background Assessment Recommendation
- Popular with nursing handoffs between shifts and communicating status updates on initiatives

Poster Presentation

- Conference style presentations
- Introduction, materials & methods, results, conclusions, acknowledgements


Phase 1: Departmental Pilot
Building an A3: Sum > Parts
PDCA
SBAR
Posters
DMAIC
A3 Storyteller
31

MERCYHEALTH

<Insert Title of Project: Topic at Hospital>

Updated on X/XX/XXXX | Champion: XYZ; **Process Owner:** ABC; **Project Leaders:** ABC; **Team Members:** ABC

SMART GOAL / AIM

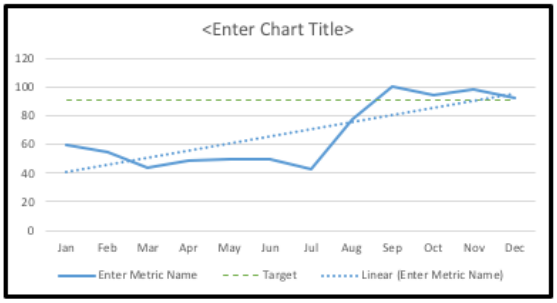
(Insert SMART GOAL: Specific, Measurable, Actionable, Realistic, Time bound)
Format: <ACTION> something from A to B by Z/Z/20ZZ.

PLAN (S+B+A of SBAR)

Problem: <Insert your "elevator pitch" for problem, or **S**ituation from SBAR>

Present Conditions: <Insert your assessment of present situation and some pertinent background (**B**ackground **A**ssessment of SBAR)>. <Include in scope and out of scope language>.

<Edit Chart Below directly through Powerpoint: To edit data and metric name right click in graphs, select "Edit Data" to tell your story. To edit chart title double click on title>

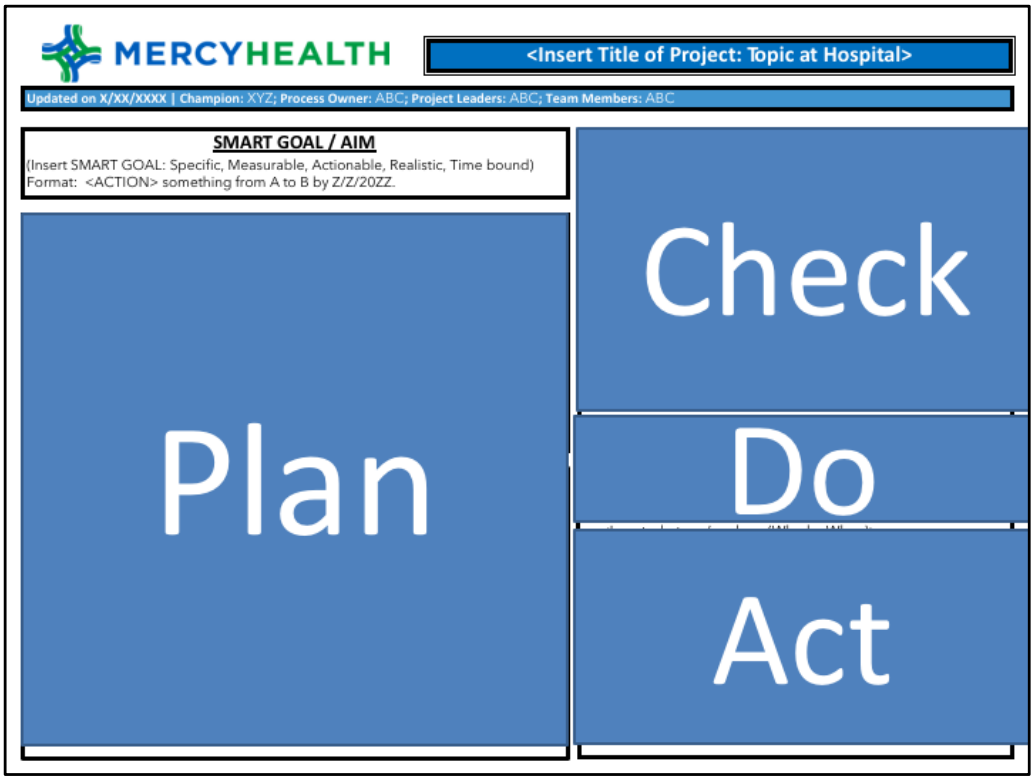


DO (R of SBAR)

- Wins: Insert opportunities to brag on your team here!
- Barriers: Insert major challenges barriers
- <Recommendation of SBAR>
- <Insert what you've done (Who by When)>
- <Insert what you've done (Who by When)>

CHECK / ACT (R of SBAR) Solutions and Countermeasures

- <Insert what you are going to do NEXT! Do WHAT by WHO by WHEN>
- <Insert SMART subgoals, next steps, timelines>
- <Insert SMART subgoals, next steps, timelines>


MERCYHEALTH
<Insert Title of Project: Topic at Hospital>
Updated on X/XX/XXXX | Champion: XYZ; Process Owner: ABC; Project Leaders: ABC; Team Members: ABC
SMART GOAL / AIM
(Insert SMART GOAL: Specific, Measurable, Actionable, Realistic, Time bound)
Format: <ACTION> something from A to B by Z/Z/20ZZ.
Plan
Check
Do
Act

MERCYHEALTH

<Insert Title of Project: Topic at Hospital>

Updated on X/XX/XXXX | Champion: XYZ; **Process Owner:** ABC; **Project Leaders:** ABC; **Team Members:** ABC

SMART GOAL / AIM

(Insert SMART GOAL: Specific, Measurable, Actionable, Realistic, Time bound)
Format: <ACTION> something from A to B by Z/Z/20ZZ.

Situation
Background

Assessment

Recommendations

MERCYHEALTH

<Insert Title of Project>

Updated on X/XX/XXXX | <Insert Team Members>

SMART GOAL / AIM

<Insert SMART GOAL… Specific, Measurable, Actionable, Realistic, Time bound… Change X to Y by 12/31/17.

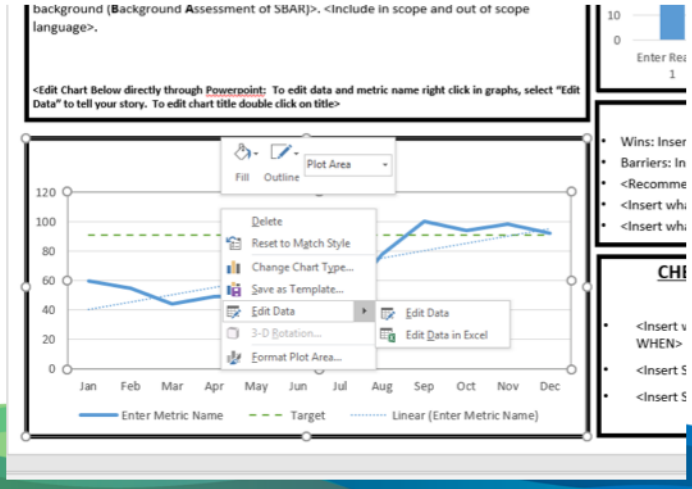
Define Measure

Analyze

Improve & Control

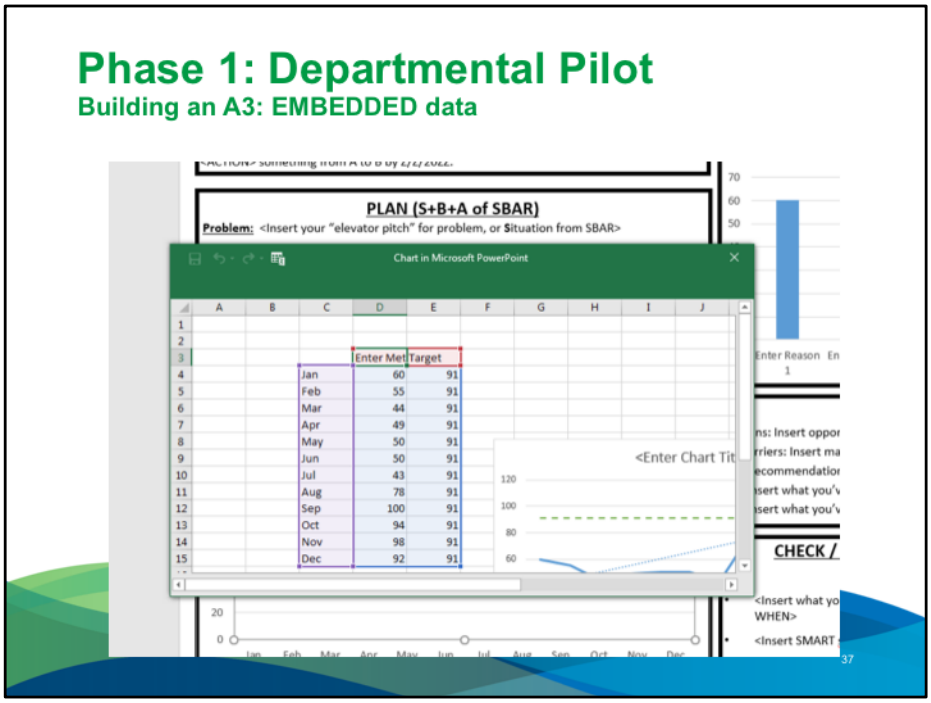
Phase 1: Departmental Pilot

Building an A3: EMBEDDED data



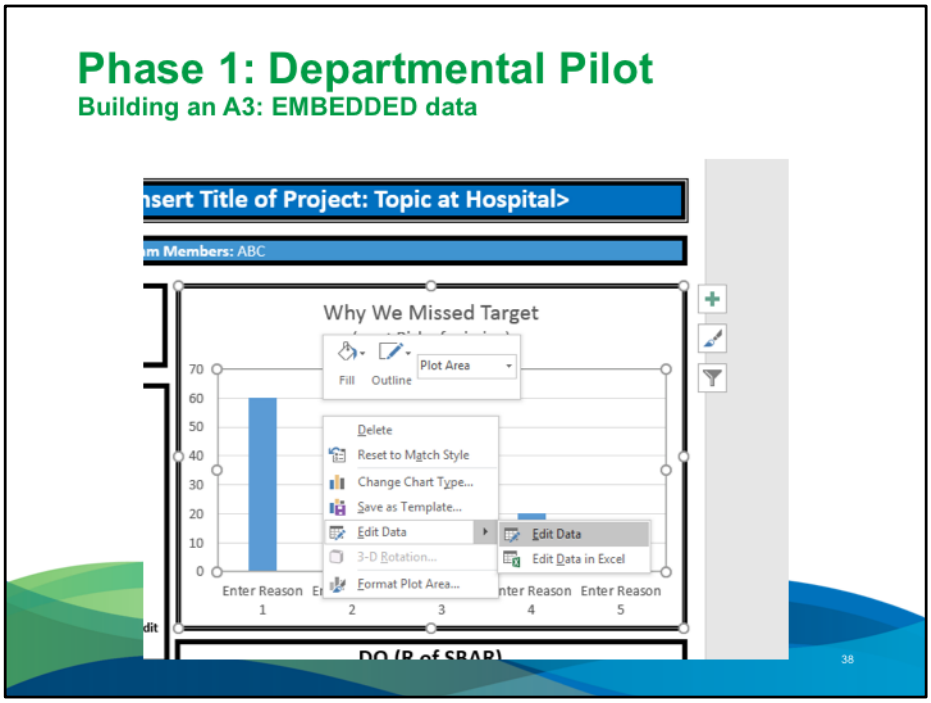
Phase 1: Departmental Pilot

Building an A3: EMBEDDED data



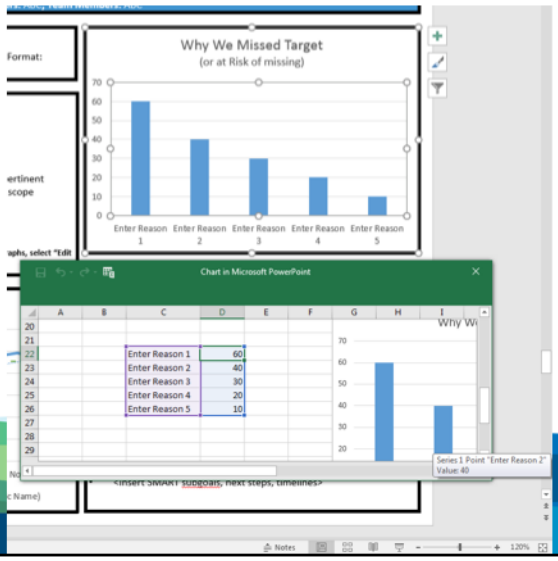
Phase 1: Departmental Pilot

Building an A3: EMBEDDED data



Phase 1: Departmental Pilot

Building an A3: EMBEDDED data



MERCYHEALTH

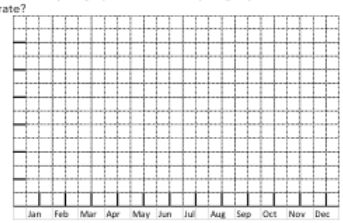
SMART GOAL / AIM

PLAN (S+B+A of SBAR)

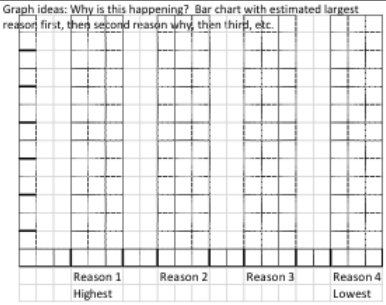
Problem: <Insert your "elevator pitch" for problem, or S from SBAR>

Present Conditions: <Insert your assessment of present situation and some pertinent background (BA of SBAR)>.

Graph Ideas: What will you graph? Where will you get your data? Who? How can you verify it is accurate?



Graph ideas: Why is this happening? Bar chart with estimated largest reason first, then second reason why, then third, etc.



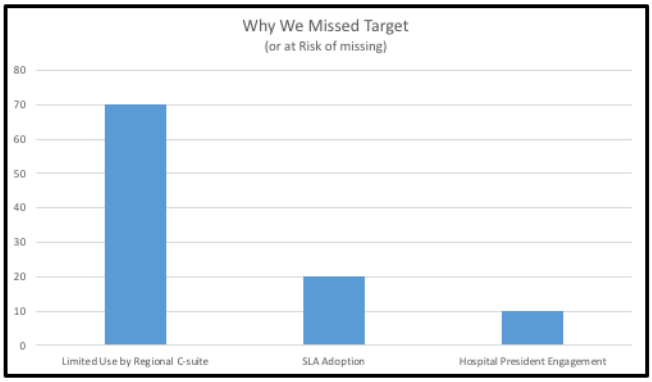
DO (R of SBAR)

CHECK / ACT (Solutions/Countermeasures & Implementation Plan, Other related projects)

Think 1 page -- literal definition of A3 as a size of paper for the printer.
What elements of your culture can you bring?
Are there other trainings the organization has embraced in the past?
What is the skill level of your leaders?
How technical?
Manufacturing/Math heavy vs Care givers/People skills heavy?
Multi-use?
Does your A3 Storyteller allow versioning?

Phase 1: Departmental Pilot

Outcomes = Limited, but momentum started



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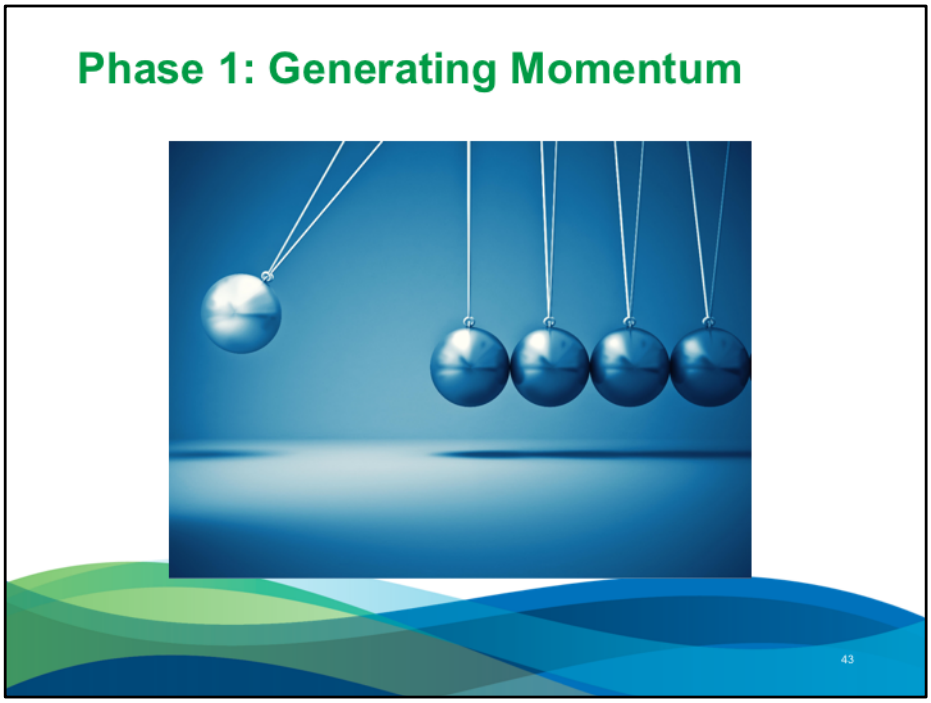


Visibility & Strategic Communication

- Who is using it?
- Who is your cheerleader?
- Huddle boards?
- Leadership meetings?
- Key system wide projects report out/communication tools?
- Who are the main players?
  - This example it was the hospital presidents and president of the presidents
  - How can we engage them?

Opportunities to use the A3 Storyteller

- Projects not going well?
- Projects on the senior executives radar not going well?
- Big scope and minimum resources?? Use the A3 Storyteller to tell that story

Visibility & Strategic Communication

- Key Meetings

Lima Hospital President

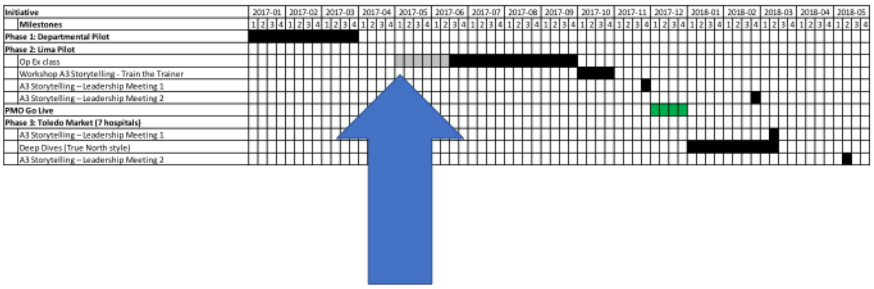
Opportunities to use the A3 Storyteller

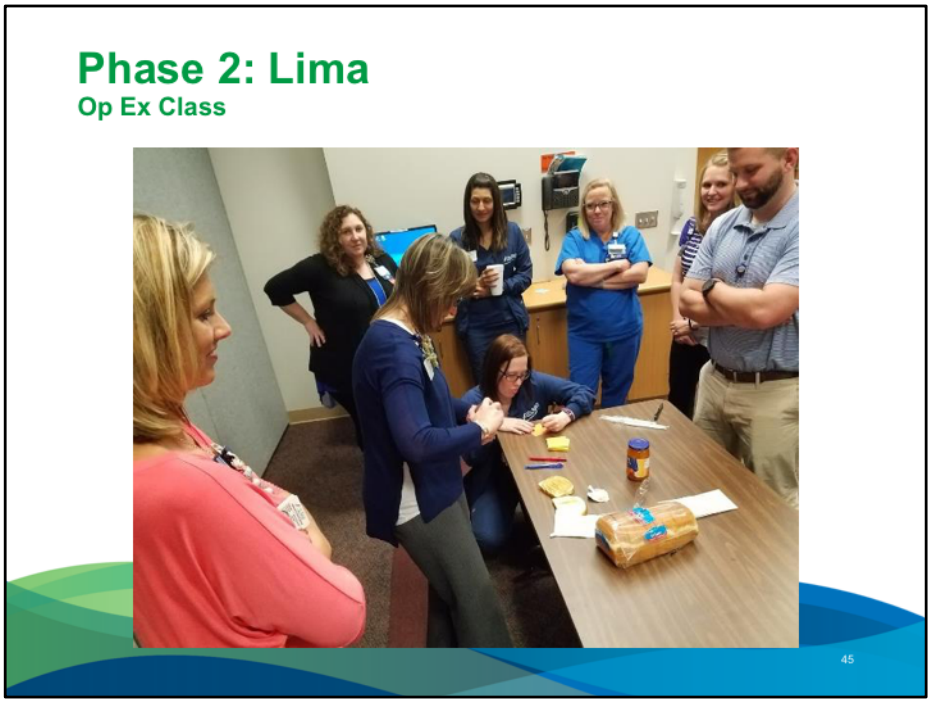
System Level Net Revenue Growth
High profile projects

GANTT

Deploying A3 Storyteller at Mercy Health

Create standardized "one page" tool to communicate change and updates and deploy across 8 hospitals by 3/1/2018
updated: Joe Schultz on 4/27/18





Process Owner

- Lima's Hospital President (St. Rita)
- Heard about some of the efforts from Phase 1 wanted to get on board
- St. Rita's had positive previous experience with Lean Six Sigma

Objectives

- Create a "white belt" training for selected Lima leaders to run a project and demonstrate change over 3 month period
- Utilize A3 Storyteller as primary communication tool
- Report out progress to executive team

Intended Users

- Selected Leaders

8 Projects

- OCC Med - OSHA recordables
- HR – Training Leaders for Onboarding
- Oncology – Wait Times
- EVS – Transport Times
- OCC Med - Clinic throughput
- Population Health – Preventable Care
- OR – Neurosurgery Growth Initiative
- ED – Glidescope Device

Project Expectations

- 1 SMART Goal
- Current State Process Map
- Metrics
- Executive Summary / A3
- Future State Process Map
- GANTT
- Key Stakeholder Meeting

GANTT

Deploying A3 Storyteller at Mercy Health

Create standardized "one page" tool to communicate change and updates and deploy across 8 hospitals by 3/1/2018
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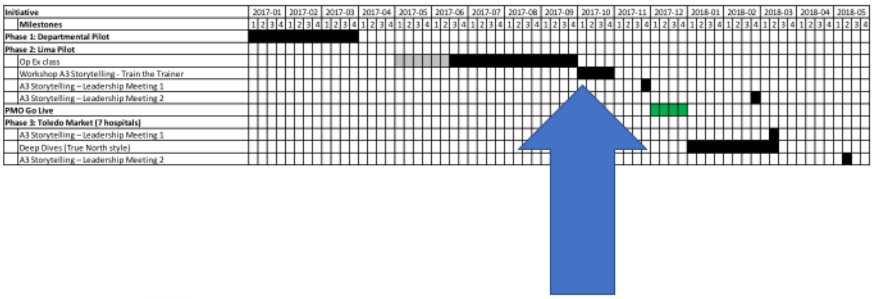
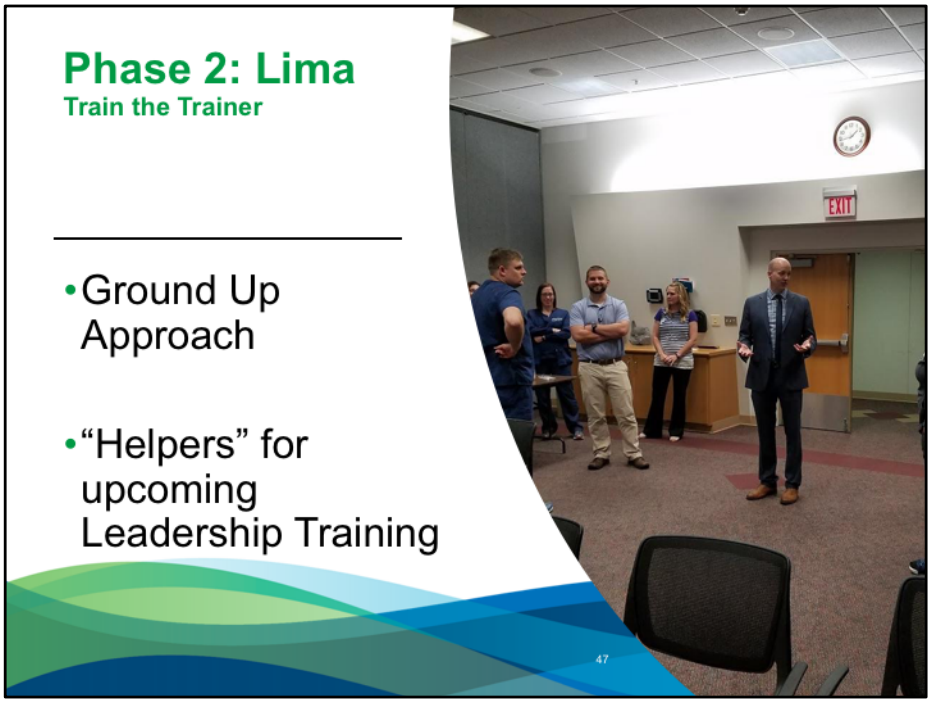




Process Owner

Lima's Hospital President (St. Rita)

Objectives

Train 30+ engaged leaders on SMART Goals and A3 Storyteller

Obtain commitment from team to be first wave of "train the trainers"

Intended Users

Selected Leaders

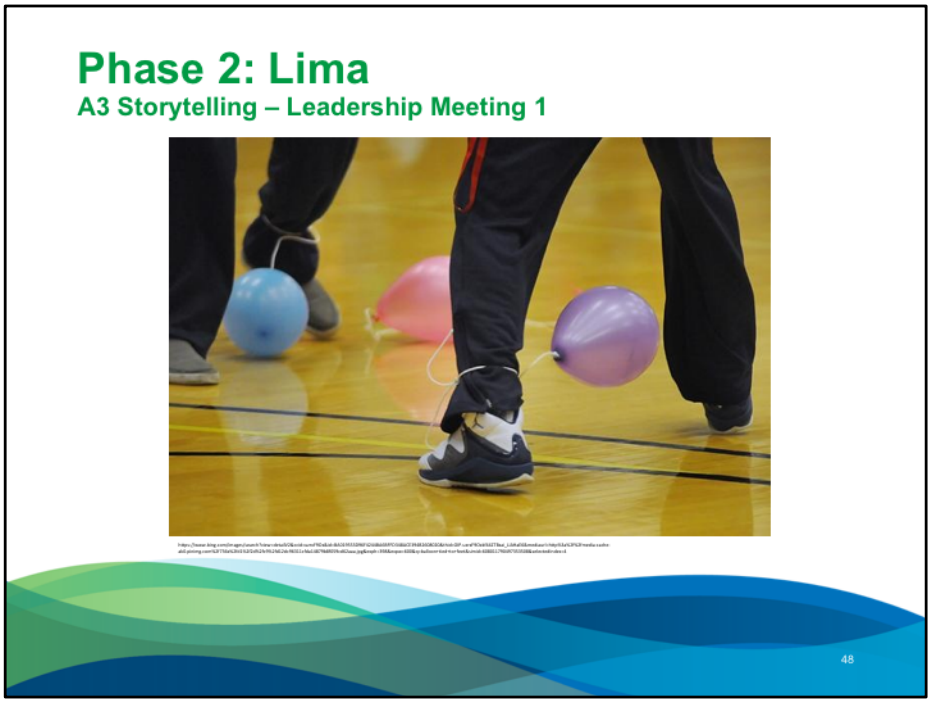
Key Findings

Created 90 min workshop

Minimal PPT

Real time creation of SMART Goal

Real time creation of A3 Storyteller
Commitment to help at the upcoming Leadership Connection Series



Process Owner

Lima's Hospital President (St. Rita)

Objectives

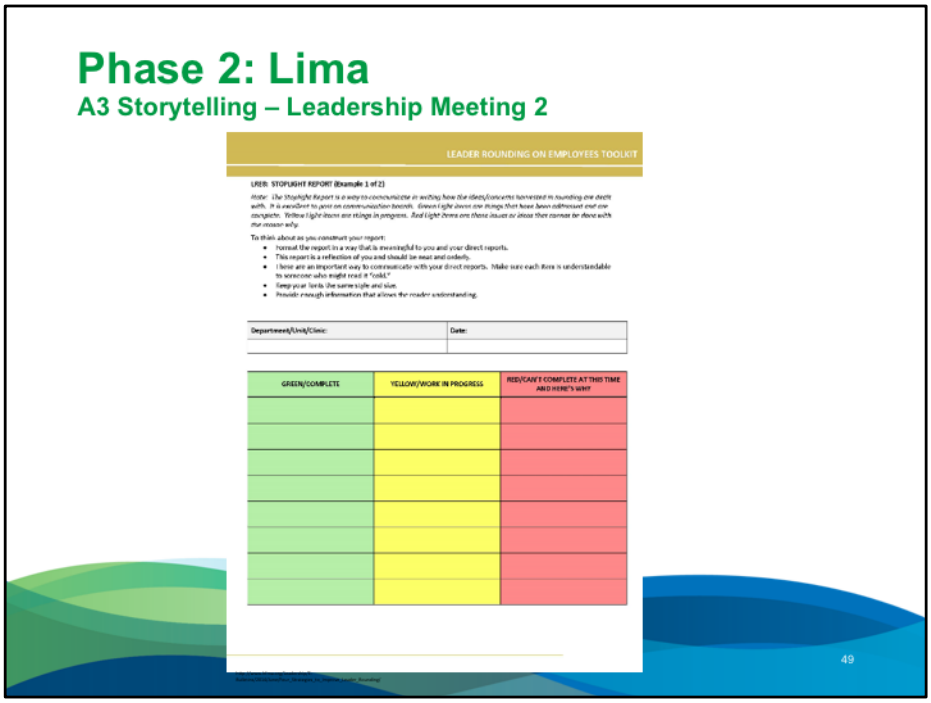
Train 150+ engaged leaders on SMART Goals and A3 Storyteller
Hospital President ask all teams to use the A3 Storyteller for their Annual Performance metrics

Intended Users

Supervisors and Above

Key Findings

Created 90 min workshop (similar to Train the Trainer)
Minimal PPT
Real time creation of SMART Goal
Real time creation of A3 Storyteller
Ice breaker about Shared Goals went well (minus latex allergy)



Process Owner

Lima's Hospital President (St. Rita)

Objectives

Discuss and eliminate barriers to using the A3 Storyteller
Introduce "Nominal Voting technique"
Train the trainer about giving feedback on others' SMART Goals and A3 Storytellers

Intended Users

Supervisors and Above

Key Findings

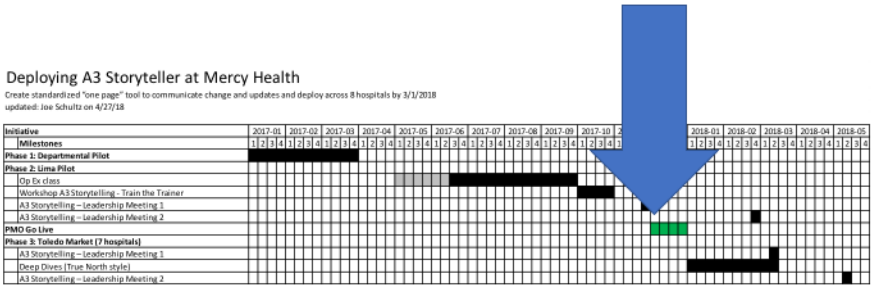
Created 90 min workshop
Minimal PPT
Used Studer type rounding tool for Red/Yellow/Green about A3 Deployment
Real time training on problem areas: Graph creation, getting data for

“Why We Missed”
Opportunity to practice coaching

GANTT

Deploying A3 Storyteller at Mercy Health

Create standardized "one page" tool to communicate change and updates and deploy across 8 hospitals by 3/1/2018
updated: Joe Schultz on 4/27/18



Process Champion

- Toledo Regional Chief Executive
- Lima's Hospital President (St. Rita) becomes President over both Lima and Toledo
- PMO Office created!

Objectives

- Replicate structures from Lima at upcoming Toledo Leadership Meeting
- Introduce "Nominal Voting technique"

Intended Users

- Supervisors and Above > 300 people

Key Findings

- Created 90 min workshop
- Minimal PPT
- Interactive activities/Ice breakers much harder with noise control

Opportunity to practice coaching

Process Champion

- Toledo Regional Chief Operating Officer
- Toledo market hired new Regional Chief Operating Officer

Objectives

- Re-engineer monthly meetings between Regional Chief Operating Officer & Hospital Presidents
- Re-engineer “WAR/True North” room and function
- Statistical Process Control
- Hospital Presidents required to complete A3 Storyteller on KPI if triggered alarms

Intended Users

- Hospital Presidents and Above

Key Findings

- Reduced time spent on non-important issues; focus on targeted KPI’s not meeting goals
- Focus shifted from blaming/shaming to learning/teaching
- Tool becoming hardwired on top down approach

Process Champion

Toledo Regional Chief Operating Officer

Toledo market hired new Regional Chief Operating Officer

Objectives

PMO team to conduct training sessions at each hospital reviewing SMART Goals and A3 Storyteller

Intended Users

Supervisors and Above

Key Findings

Teams didn't want to discuss their own SMART Goals very much, but needed to hear the whole presentation again

Leaders interested in belt system for demonstration of personal growth

Process Champion

Toledo Regional Chief Operating Officer

Toledo market hired new Regional Chief Operating Officer

Objectives

PMO to build structure around aligning and cascading goals within the both regions by 8/1/2018 for planning of 2019 HR Performance Appraisal structures

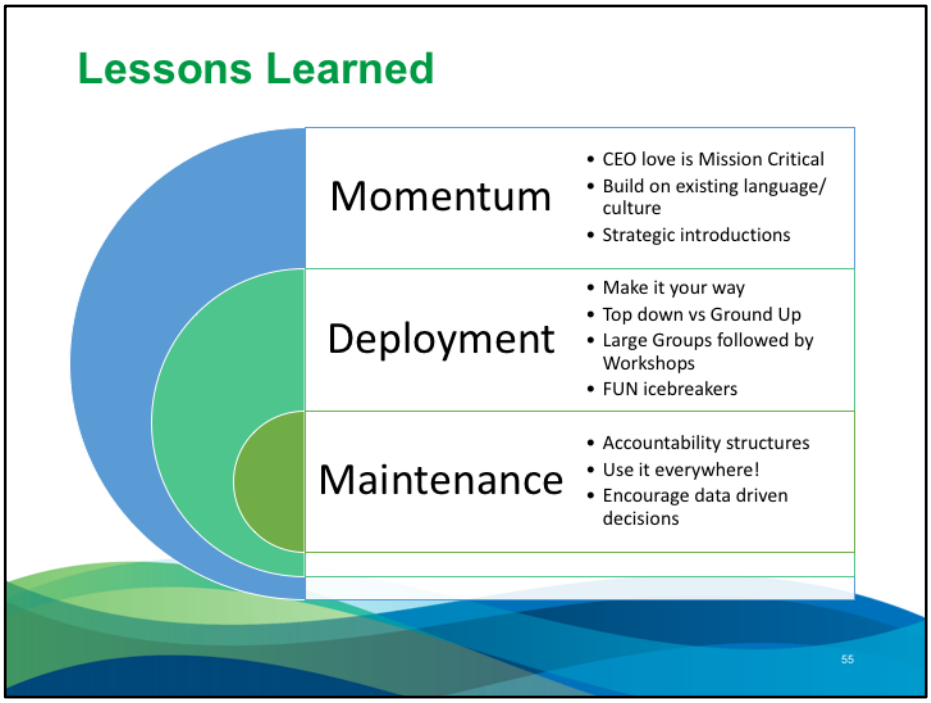
PMO to build transparent Balanced Scorecard per leader around aligned & cascading goals

Intended Users

Supervisors and Above

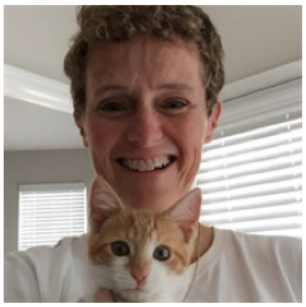
Key Findings

TBD


Lessons Learned
Momentum
• CEO love is Mission Critical
• Build on existing language/ culture
• Strategic introductions
Deployment
• Make it your way
• Top down vs Ground Up
• Large Groups followed by Workshops
• FUN icebreakers
Maintenance
• Accountability structures
• Use it everywhere!
• Encourage data driven decisions
55

Special Thanks

- Dedicated to **Marybeth Quinn**, former Director of Business Process Improvement at Nationwide Children's Hospital in Columbus, Ohio.



- Jason Theadore
- Will Krost, MD

- Mercy Health Executive Team: Bob Baxter, Jim Weidner
- PMO Team

Questions?

Joe Schultz
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Mercy Health Northwest Region serving Toledo & Lima Mkts

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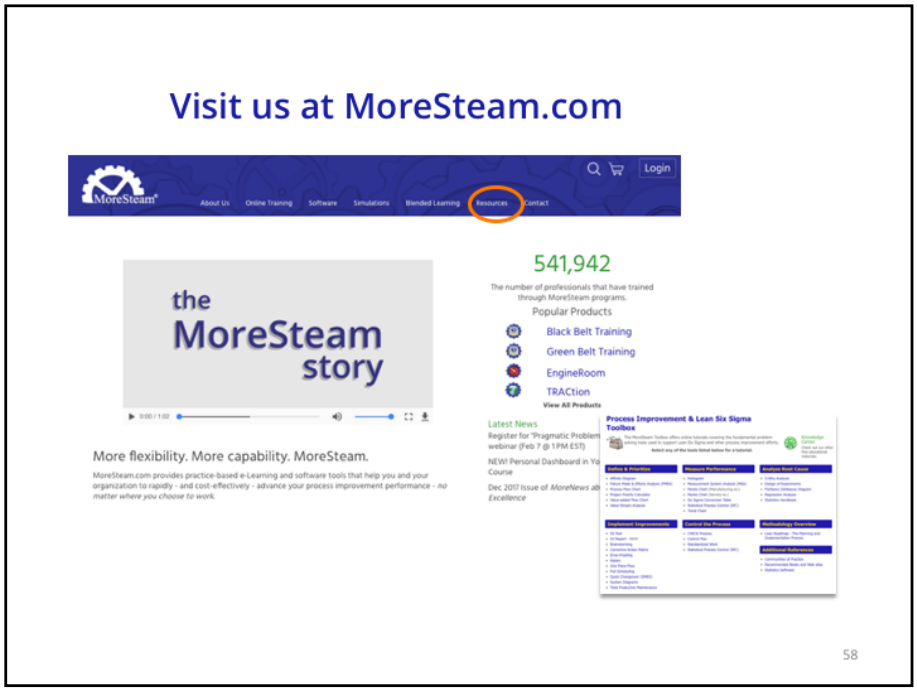
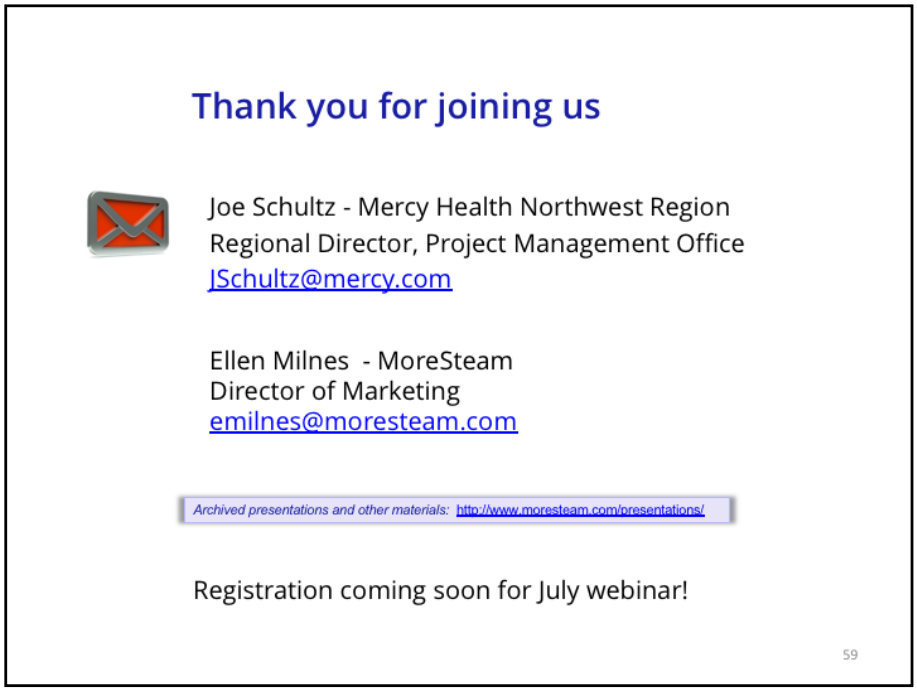


I'll close the program with a quick mention of additional professional development opportunities:

- For those of you who are certified Black Belts and are interested in taking your career to the next step: MoreSteam, in partnership with Ohio State, offers a MBB certification program that combines online course modules with two weeks of classroom sessions.

- For those of you who are NOT already certified Black Belts, we offer a Blended Black Belt training & certification program. You'll find this to be THE BEST value on the market. The package includes ~140 hours of online training, study halls, coaching, project review, & certification.

- Please visit our website for more information … and to check out our bank of free resources (tutorials, webcast recordings, blogs, etc.)



Thank you for spending the past hour with us. Here is contact information for both Joe & I if you'd like to follow-up with additional questions or comments.

As I mentioned earlier, the materials from today's program will be available on the MoreSteam website. Watch your Inbox for an email with a link to the specific page.

Again, thank you. ☺ We look forward to "seeing you" at future events.