TOOLS FOR TRANSFORMING CARE AT THE BEDSIDE

The American Organization of Nurse Executives
Tools to support TCAB

- What are we trying to accomplish?
- How will we know that a change is an improvement?
- What changes can we make that will result in improvement?

- Increasing impact: ways to scale, spread, and sustain your experiment and TCAB in your unit
- Creating a design challenge
- How to conduct a brainstorm
- Brainstorming rules
- Idea Sorting & Selection

- Creating small tests of change
- Evolving your idea
- Getting feedback
- Rapid prototyping
When thinking about how you might transform care at the bedside, it is helpful to create a design challenge, or brainstorm question, as starting point for coming up with new ideas. Good design challenges are often inspired by remarkable or disappointing real-life experiences. Use the format below to capture actual stories, consider what insights you might learn from them, and use this as a starting point for asking generative questions.

**Story:** Think about a time in your own experience or in your organization’s when exceptional or not-so-exceptional healthcare was delivered. Describe the experience below:

*Patients who are undergoing total hip replacement attend a pre-op training class that educates them on:*
- their condition and reason for the procedure
- how to prepare for the procedure
- the steps of the procedure itself
- their role in their care during in-patient recovery (especially in pain management)
- how to prepare to make the transition home.

*Nurses commented that patients who have participated in a pre-op training class are less fearful, recover more quickly, and take one day less to educate for discharge.*

**Insight:** What does this story start to tell you about what’s needed to provide exceptional care?

*Patients who are educated about their care are better able to participate in their care and recover more quickly.*

**Design Challenge:** With this insight in mind, create a design challenge that is aspirational and generative.

**How might we...**

**EDUCATE AND INVOLVE PATIENTS IN THEIR OWN CARE?**
**PLAN**

**creating a design challenge**

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PLAN

how to conduct a brainstorm

To many people, brainstorming is synonymous with an undisciplined conversation. Guess what – conducting a really good brainstorm involves lots of discipline and takes a fair amount of preparation. Here are some suggestions for conducting a meaningful brainstorm.

Steps:
1. Getting ready - Most importantly, you have to provide the right inspiration for your team. Bring people from different disciplines together, and involve people outside of core team for fresh perspectives. Prepare (or ask participants to prepare) some rich stories that reveal the issues and opportunities. Formulate some good brainstorm prompts. Reserve a room with sufficient wall-space where you can comfortably get up from your chairs. Gather materials: post-it notes, markers, paper, tape, and snacks to give people energy.
2. Prep the room before people arrive. Put out lots of post-it notes and markers, candy, and even some toys to stimulate people’s thinking.
3. Use storytelling as a way of getting into the topic. Ask people to share a few stories to focus the group on topic and inspire them. If possible, use pictures to help tell the stories.
4. Just before you start brainstorming, remind people of the rules. You might try to ask people to recall them from memory.
5. Choose an easy topic to get warmed up, or even a generic warm-up problem that encourages wild ideas (like the classic “how many uses you can think of for a paper clip?”).
6. Lead the group through each brainstorm topic. If idea production slows down, provide a prompt, e.g., “consider one of the 5 senses,” or “think about spaces, tools, roles, new process steps, or incentives.” It’s helpful to think about specific elements from storytelling that might help spark ideas. When people really slow down, switch to a new topic.
7. After 30 - 60 minutes, stop! (Yes, you can have too much of a good thing!)

Brainstorm Rules
> Defer judgment
> Encourage wild ideas
> Build on the ideas of others
> Stay focused on the topic
> One conversation at a time
> Be visual
> Go for quantity
PLANNED

brainstorming rules

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7. Go for quantity
idea sorting & selection

The challenge after a good brainstorm is to identify some ideas that you want to develop.

There are lots of criteria you can use to choose ideas. Try these:

- a personal favorite or idea you’re most passionate about
- the idea you think will have the most impact
- the idea you think will be easiest to implement

Sometimes it’s fun to vote for ideas as a group. You can give everyone voting dots and ask them to put their dots on the most promising ideas. Voting lets you see what the group is most interested in, and it also makes it easier to divide the work up among team members.

You can also try to sort the ideas. Try arranging them in a 2x2 matrix according to how long you think it would take to implement them and how “discrete” (stand alone) or systemic (big, interconnected) they are. (It’s usually good to select ideas that are short term and discrete. Try to come up with ways to translate ideas that fall anywhere else on the matrix into that lower left quadrant.)

Probably the most important thing to remember is that you don’t have to be scientific about choosing an idea — besides, most ideas end up changing once you introduce them to your colleagues or into the system! If you start with an idea you think has promise, it will be a lot more fun to develop the idea later.
idea sorting & selection matrix

systemic

short term discrete

long term
DO

rapid prototyping

What’s the least you can do to learn the most?

The goal of this activity is to quickly create and communicate your ideas to others. Try to be as “quick and dirty” as you can—don’t spend time recreating things that everyone already understands. For instance, if you need a laptop, borrow one from somewhere—don’t make one.

Steps:

1. In your team, decide on a customer whose experience you would like to design.
2. Each team should select a handful of ideas from the brainstorm list that you think would have a big impact on your chosen customer’s experience.
3. Break the team into smaller groups. These smaller-sized groups will allow many different prototypes to be developed quickly. Each small subgroup will begin to develop an idea or two by making it tangible.
   - If your idea is a new tool, use the prototyping materials at the table to build your idea.
   - If your idea is a new process, draw a map of the steps in the process and act out how each step would happen. For instance, one person can play the role of the patient, and another person that of a care provider.
   - If your idea is a new role, create a job description and maybe a uniform. Role-play how that new role would behave with the patient.
   - If your idea involves redesign of your space, use colored paper to design the layout of the space. Show how patients and care providers would flow through the space.
4. Bring the whole team back together before it is time to present. Someone should volunteer to introduce your team’s presentation and explain the Principle that your ideas will address.
5. Solicit and give feedback. What did you like? What questions do you have? What suggestions for improvement?
creating small tests of change

Introducing a new idea as an experiment, with small tests of change, allows you to test its viability while letting others see what’s possible.

Always introduce the new ideas as experiments. People generally like to “try before they buy.” When introducing a new idea, don’t assume that just because you thought it up it will actually improve things. By introducing your new idea as an experiment, you give people the chance to co-develop the idea and get interested in it. Your idea will nearly always be improved upon by the people who are part of the experiment.

Steps

1. First, engage willing participants. Because change is often unwelcome, it’s best to find a friendly place to test your idea. Who do you know that is frustrated by the way things currently work, and has tried to fix things before? Enlist them to participate in your experiment. Once they’ve shown that your idea does lead to improvement (or once they’ve improved it themselves), then you can test the idea with more skeptical people.

2. Get useful feedback. Ask your testers to tell you what they liked and what they might do differently. Ask open-ended questions to learn more about the user’s experience. Don’t try to sell your idea when testing, just learn what is working and what could be improved.

3. Be sure to measure the impact of your idea. You don’t need to collect months of baseline data to measure the impact of an idea. Try to establish some simple measures that will show others whether the idea is working or not.

Tips for introducing small tests of change

> Scale your experiment down to minimize the risk – start with an hour, a single patient, a single shift.

> Introduce multiple variations on your idea simultaneously so people understand that some ideas will fail.

> Don’t let people kill your idea on the first try – if they say your idea didn’t work, ask them why and ask them for suggestions for how to improve the next round. Then get them to try it with their suggestions incorporated.
# evolvin your idea

Fill this out before (1) and after (2&3) field testing to guide your learning. Bring the results as well as images, artifacts, or surveys of your tests to your next meeting to share with your team.

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<tr>
<th>What Question(s) are you trying to answer? What Tests will you try to learn more? Who could you involve to learn more from?</th>
<th>What did you Learn? What results, insights, or hurdles did you encounter? Include quotes and feedback.</th>
<th>What New Questions do you now have? What new ideas does this give you? What new tests might you try next to learn more?</th>
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STUDY

getting feedback

Use this to help record the feedback you get from real users in the field.

Concept Name: ___________________________ Date: ___________________________

+ What did the user like about the experiment? What got them excited?

? What questions did it raise for them? What did they find challenging?

! What else might they wish for? What new ideas did you get from watching them try the idea?
Increasing Impact

Ways to scale, spread, and sustain your idea in your TCAB unit

Introducing a new idea into your unit is a great experience! Creating small tests of change to improve the idea is also fun (and a lot of work ...)

Getting your idea to be adopted by the whole can be a challenge—unless you’ve come up with an idea yourself or been directly involved in testing it, an idea might not seem all that great to you (since it will probably involve a change in the way you do your work!)

The best way to guarantee adoption is to make sure that as many people as possible are involved in designing it. If you’re designing a new tool to use around shift change, what if you had every nurse on the unit try it out and give feedback over the course of a few weeks? Then, when the idea comes around the next time, people will either a) welcome the idea because they played a role in its design, or b) not complain so much because they played a role in its design and knew it was coming.

There are lots of other ways to encourage ideas to scale, spread, and sustain in your TCAB unit. Try some of these:

**Hold a competition for the best idea of the week / month / quarter.** Advertise the winners in the break room or at a staff meeting. That will give the idea exposure and create interest among the staff to try it out.

**Create measures of the number of changes implemented, and track them over time to see how many are sticking.** Better still, find a sister TCAB unit and make a (friendly) competition out of it!

**Create and track measures of how changes have positively impacted your key performance indicators.**

Ask a representative from each discipline to evangelize the idea to their colleagues. Create a story about how the improvement positively impacts their discipline.

Get the unit to list all the reasons they can think of that an idea wouldn’t be adopted by 100% of the unit. Then brainstorm the ways you could guarantee 100% adoption.

Devote some time at staff meetings to storytelling about how improvements have changed the lives of patients, families, staff, doctors, care specialists, and other stakeholders.

Show staff the importance of adoption and ongoing adaptation of new ideas by making it a topic of their ongoing performance review. Imagine a measure for “willingness to adopt and adapt new ideas” for everyone on the staff, and a reward to the group for achieving a unit-based target.
increasing impact brainstorm

Get your TCAB unit to brainstorm a list of ways to have a bigger impact:

Consider:

> Who’s feedback would you need to get next?
> Who do you think would benefit from this?
> Who might resist this change and how can you get them to help you?
> Who might be able to improve this idea or give another perspective?
> What additional stakeholders do we need to engage?
> How might we celebrate what we’ve accomplished so far?
> What could we measure that would let us know what’s working?

Now go out and change the world!