Investigate the Problem (**I**HQSE)

Problem Statement

Your Problem Statement captures the issue you are planning to tackle and proves to your audience that you have a problem, using data. This should be a simple sentence that captures WHAT is your Problem, followed by data to prove it.

Examples:

- Over-sedation of patients in the ICU increases mortality by 25%, leading to 30 additional deaths per year.
- Inappropriate use of physical therapy consultation wastes 10,000 hours of therapist time each year.
- We only use the Pulmonary Embolism Pathway 50% of the time, and when not used, mortality for patients with acute PE doubles.

Step 1: Discuss your problem – consider the Value equation.

Step 2: Draft Problem Statement.

- An effective Problem Statement should address the following questions:
  - How do you know you have a problem?
  - Who is affected?
  - By how much?
  - Are there guidelines / best practices / standards that you are not meeting? Consider a literature search to ensure you can speak to this.
  - Include metrics, which serve as your baseline data.

Step 3: Identify missing information and a plan to acquire this data.

Voice of the Customer

The Voice of the Customer tool is a way for you to gain an understanding of your key stakeholders and their thoughts on your problem — including their relevant motivations, needs, and perspectives. The goal of this process is to learn what is going well, what is not going well, and what are their ideas for improvement.

Even if you know a group's perspective, performing a VOC allows you to engage and communicate with them in a way that allows them to feel heard. And, most often, you will learn something you didn't know! This process also plays a crucial role in identifying people interested in helping you, signaling that change is coming, and that you want their support.

- **Step 1: Identify your stakeholders.** Consider, as appropriate:
  - Who are your providers and staff?
  - Who is the business? Executive stakeholders?
  - Who are your patients and their families?
- **Step 2: What do you want to know from them?** Particular topics, domains, processes
- **Step 3: What are your methods of engagement?**
  Consider survey, interview, focus group, etc.
  - How will you engage each group? What format?
  - *Capture in Table Below*

- **Step 3: How will you feed the information back to your customer?**
  This is technically not required for a VOC but is an opportunity to engage them in the process such that they are more aware of the work, feel they have contributed to it, and feel heard. This will go a long way to helping gain their buy-in in the eQuip phase of the IHQSE Model for Change.
  - Make a feedback plan for each customer. *Capture in Table Below*

VOC Engagement Plan

Customer	Method to Engage	Domains / Topics to learn more about	Feedback Method
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

Customer = Person you are going to talk to
Team owner = Person from your team who is going to conduct the interview / meeting

Methods of Engagement: Patient Interviews

Sample interview questions for a patient.

- What was the best part of your healthcare experience?
- What was the worst part of your healthcare experience?
- What was frustrating about your care experience?
- Did you feel listened to?
- Did you observe teamwork happening?
- Did you get clear communication of your care plan? Did you understand what was happening?
- Did you find the healthcare system (clinic/unit/floor) easy or frustrating to use?
- Did you have to wait for a long time to get your care?
- Was any of your care duplicated, or feel unnecessary?
- What could we have done better to improve this process/care area?

Methods of Engagement: Staff / Provider Interviews

Sample Interview questions for a team member:

- What is the best part of your workday / role / clinical arena where project work occurring?
- When things are going well, what does that look like?
- What is the worst part of your workday / role / clinical arena where project work occurring?
- When things aren't going well, what does that look like?
- What could we do better to improve this process/care area?

Methods of Engagement: Organizational Interviews

- Review list of stakeholders that you need input from.
- Plan your approach to the conversation—what will you ask to uncover: motivations, perspectives, or needs?
- In some cases, you will want to meet with a stakeholder more than once. The first time should be about understanding their motivations and perspectives. The second, and possibly subsequent meetings, is to share information about the problem you are working on, get their impressions, and discuss the support you may need.
    - Sample questions for first meeting with colleagues / organizational stakeholders.
        - **Motivations**
            a. My understanding is that institutional focus is on length of stay, cost of care, mortality, readmissions, etc. Can you tell me more about the work in these areas?
            b. In what ways has the contribution of [your clinical area / project focus area] been considered in these domains?
        - **Perspectives**
            a. What current work [in your clinical area / project focus area] is taking place?
            b. You may want to mention what some other organizations are doing, such as:
                i. are working on related criteria in quality rankings.
                ii. have leaders at organizational level focused on this area.
                iii. have unique workflows focused on this area
    - Sample discussion for second/subsequent meetings:
        - **Needs**
            a. Go through any data you have around your problem
            b. What are your initial impressions?
            c. What do you see as potential next steps?
            d. How do you feel this work can support your efforts?
            e. How can you potentially support this work?

Engagement Plan: Surveys

Surveys are a strategy for understanding your stakeholders' or customers' perspectives, motivations and needs. They are also an opportunity to signal that this work is coming, to socialize your problem/effort and identify those who may be interested in joining your effort.

Answer the following questions:

1. Who is the group of stakeholders you'd like to assess?

2. What are 3-6 questions you'd be interested in asking them?
    a. Consider ideas you may already suspect but want to be able to reflect back to the group

        1.

        2.

        3.

        4.

        5.

        6.

Identify the timeline for key steps in administering your survey:

1. First meeting for those managing the survey
2. Deadline for developing the questions
3. Launch survey
4. Collate the findings
5. Share the findings

Process Map

The goal of your Process Map is to make the process that you are trying to improve more visible to each team member and stakeholder. It allows you to see each step that may otherwise be invisible to you. **This is a team activity given the siloed nature of our work, and is best done in person, with a whiteboard and sticky notes.**

Recognize that process mapping is a technical tool to understand how work gets done. But the process of process mapping is an adaptive tool that creates engagement, inclusion and buy-in. It allows all team members to share their ideas, insight, and improvement ideas, and messages that you care about their feedback.

Step 1: Identify the start and stop of the process.

This allows the team to agree on the scope of the problem. For example: For a problem tackling a long length of stay in the hospital, what is the process start? Is it when the patient shows up at the emergency room? When the ER doctor decides to admit them? When the patient gets to their bed in the hospital? Or when the primary team places the first set of orders? Each of these starts suggests a different scope of project work.

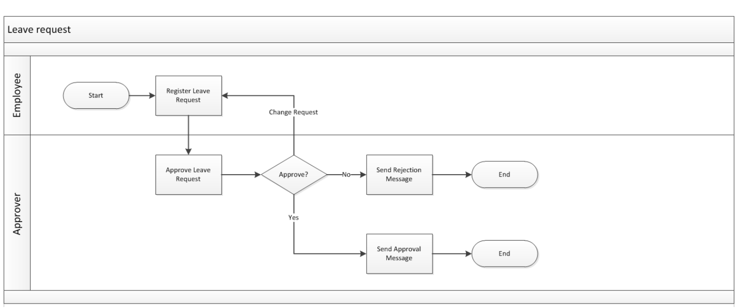
- PROCESS START:
- PROCESS STOP:

Step 2: Determine the entity you are following.

This may include a person, material, or information. For example: Some processes follow a person – such as a patient moving through a hospital admission. Others follow a material – consider a process looking at lost phlebotomy samples, that tracks where the blood samples travel in a hospital. Finally, others follow information – consider a patient calling a clinic with a question, and the process to understand who answers that question.

- What are you following?

NOTE: if there are multiple people involved in the process, consider creating a swim-lane diagram where each person/group is a lane in the pool.



Step 3: Add the discrete steps.

For this step, you will need representation from many different viewpoints, as it is likely that you don't fully see or understand other's role in a process.

- Use a white board or virtual white board for this activity.
- Use consistent shapes and arrows
    - Oval = start/stop process
    - Square = step in the process
    - Diamond = a decision/branch point with 2+ arrows leaving (IE: Yes/No)

NOTE: Be as discrete as possible with each step and consider whether this process is different at different times of the day or weekday vs weekends

Step 4: Identify the steps that cause pain.

This may include steps that yield waste, inefficiency, or frustration. These are steps that the team can agree are unnecessary (duplicative efforts), problematic (causes frustration), or highly variable (everyone does it a different way.)

- Add a star or other symbol for PAIN POINTS.

Step 5: Identify the steps that bring joy and connection!

You want to try not to eliminate these steps! You may have to do so because the step is so inefficient but weigh the upsides of efficiency gains against the downsides of losing provider satisfaction in their work with the change. For example, if spending the time counseling a patient on their care plan is highly valuable for the provider don't make a change that will eliminate this face-to-face interaction as it will be a dissatisfier.

- Add a heart or other symbol for points of JOY.