

Coaching Overview & Project Work Timeline

Month 1: Identify your Problem and Team

Overview:

- Complete 2-day Improvement Academy program
- Meet with your Coach during IA and set up first meeting
- Create plan for standing meetings every 2–3 weeks for the next 6 months

Pre-work for Coaching Sessions:

- Create your **Problem Statement**
 - Literature search or local environment scan to understand best practices
 - Metrics or goals of institution, unit, or at national level
- Identify any missing information for your Problem Statement
- Ensure you have a **Sense of Urgency** for your project work
- Identify colleagues who should be involved in your project work - **Guiding Coalition**

Coaching Session Goals:

- Review Pre-work
- Discuss Key Realizations in project work
- Come with 2–3 questions or challenges to discuss with your Coach

Month 2: Understand the Problem

Overview:

- The goal of this month is to engage in Step 1 - Understand the problem.

Pre – Work for Coaching Sessions:

- Finalize a concise **Problem Statement**
- Complete **Voice of the Customer** with providers, staff, patients, others

Coaching Session Goals:

- Discuss key realizations from your VOC
- Discuss if or how this will change your Problem Statement

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Months 3 and 4: Understand the Problem, Develop the Solution

Overview:

- The goal is to complete Step 1 – Understand the Problem

Pre-work for Coaching Sessions:

- Identify what process you will map out to help you understand your problem
- Identify your process and outcome metrics
- Plan for an event to understand Root causes (Affinity Diagram)
 - Who should attend?
 - What format (virtual, live, whiteboard, etc.)?
 - When? Set a date.

Coaching Sessions Goals:

- Discuss your process map event and how your coach can help support or facilitate
- Discuss your Affinity Diagram event and how your coach can help support or facilitate

Post Coaching Sessions:

- Complete **Process Map** and **Affinity Diagram** events
- Identify pain points in the current process from both of these events

Months 5 and 6: Develop the Solution, Prepare for the Change

Overview:

- Develop solutions and prepare for the change

Pre-work for Coaching Sessions:

- Use the Pareto Principle (or create a Pareto Diagram) to identify the most impactful contributing factors
- Use **Design Thinking**, **Positive Deviance**, and **Hierarchy of Interventions** to identify **1–2 interventions** that will address each contributing factor
- Perform **Pre-Mortem** prior to any intervention

Coaching Session Goals:

- Discuss your interventions and create an **Implementation Plan**, with consideration of the steps of Change Management:
 - What change will you make?
 - Who needs to know about the change?
 - How will you communicate this change? **(Step 4)**
 - What resistance/barriers will you face? How can you address these? **(Step 5)**
 - How will you celebrate your short-term wins? **(Step 6)**
 - How will you measure your process and outcomes? **(Data Plan)**

Post Coaching Session:

- Finalize **Implementation Plan**
- Finalize **Data Plan**
- Complete Change Management Playbook, with focus on Communication, Removing Barriers, Celebrating Wins.

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Month 7: Implement the Solutions

Overview:

- **Implement** at least 1 of your interventions and understand the impact of your change.
- Ensure Pre-mortem is complete prior to implementation.

Ongoing Team Meetings and Coaching Sessions:

- Continue to plan interventions, perform pre-mortem, implement interventions, analyze your data for the impact, and make changes as needed.
- Return to the steps of **Change Management**:
 - Where are you facing resistance?
 - Why are they resisting (consider SCARF)?
 - Which of the 8 steps could use more attention?

Months 8 and 9: Sustain the Change

Overview:

- Ensure you have a tracking plan to monitor your data over time (Run Chart, SPC)
- Present and celebrate your work with Executive Stakeholders

Create a **Presentation** to deliver to your stakeholders

- Use the project presentation template

Month 10+: Sustain and Communicate!

Overview:

- Stay in touch with your IHQSE coach and share all of your ongoing successes!
- Consider opportunities for publication and dissemination

Create **poster, abstract, presentation** for dissemination

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The faculty team will review your Problem Statement, Business Case, and Implementation Plan and offer feedback to support your work. Your coach will review all other assignments.

Timeline	Coaching Review Topics	Assignment Due
Month 1	<ul style="list-style-type: none"> • Miro • Problem Statement • Voice of the Customer 	<ul style="list-style-type: none"> • Guiding Coalition / Project Team • Problem Statement
Month 2	<ul style="list-style-type: none"> • Process Map • Affinity Diagram • Metrics 	<ul style="list-style-type: none"> • Voice of the Customer
Month 3	<ul style="list-style-type: none"> • Business Case 	<ul style="list-style-type: none"> • Process Map • Identify Process, Outcome Metrics • Affinity Diagram
Month 4	<ul style="list-style-type: none"> • Pareto Analysis • Hierarchy of Interventions • Positive Deviant • Design Thinking 	<ul style="list-style-type: none"> • AIM Statement • Business Case
Month 5	<ul style="list-style-type: none"> • Pre-mortem • Equity Analysis 	<ul style="list-style-type: none"> • Pareto Analysis • Identify Positive Deviant • Design 1-2 interventions
Month 6	<ul style="list-style-type: none"> • Vision & Logo • Run Charts & SPC 	<ul style="list-style-type: none"> • Complete Change Management Playbook • Implementation Plan • Data Collection Plan
Month 7	<ul style="list-style-type: none"> • How to Give a Great Presentation 	<ul style="list-style-type: none"> • Review Communication Plan • Review Celebration of Wins • Data Collection
Months 8-9	<ul style="list-style-type: none"> • Scholarship in QI 	<ul style="list-style-type: none"> • Presentation
Month 10		<ul style="list-style-type: none"> • Scholarship Product • Sustainability Plan