



## 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

### 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 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.



## Month 7: Implement the Solutions

### Overview:

- **Implement** at least 1 of your interventions and understand the impact of your change.
- Ensure Pre – Mortem 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?

## Month 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



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

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