Continuously Improving the Way We Write

PDSA Rev 2.0
Obstacles are the HEART of the Matter

THE FIVE COACHING
Daily Routines/ Kata Questions

1. What is the Target Condition?
2. In your Current Condition, what is your Actual Condition now?

TURN CARD OVER

3. What Obstacles do you think are now preventing you from reaching the target condition?
   *Which one (obstacle) are you addressing now?

4. What is your Next Step? (next PDSA/ experiment) What do you expect?

5. When can we go and see what we Have Learned from taking that step?
   *You'll often work on the same obstacle for several PDSA cycles.
The **Steps** of the Improvement Kata Frame and build upon one another

Each step of the Improvement Kata pattern operates within the context of the previous step. This **framing effect** is an integral part of effective problem solving.

1. **Frames**
   - Understand the Direction and Challenge

2. **Frames**
   - Grasp the Current Condition

3. **Frames**
   - Establish the Next Target Condition

4. **Frames**
   - Iterate Toward the Target Condition

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Each Step of Clarity Improves Experimentation

1. Understand the Direction and Challenge
   - The clearer the definition of the Challenge, the more appropriate will be your analysis of the Current Condition.

2. Grasp the Current Condition
   - The better your analysis of the Current Condition, the more precise your definition of the Target Condition can be.

3. Establish the Next Target Condition
   - The more precisely you define the Target Condition, the better and more quickly you can recognize obstacles and Iterate toward it with rapid experiments.

4. Iterate Toward the Target Condition
   - Clearly writing obstacles will help you write better and more effective PDSAs.... ultimately impacting the process/outcome metrics.

The more clarity you can build into each of the Improvement Kata steps, the better you can experiment.

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Objective of a Good Coach – Move **Mindsets**

**Mindset 1: A Fixed Mindset**

We derive a lot of our sense of security and confidence from **certainty**, and tend to seek it. The way the adult brain functions, we naturally strive to operate in what I call a **Zone of Apparent Certainty**, where things are as **expected**, rational, calculable, logical, **familiar**, risk free & certain.

With this **mindset**:

1. We expect that things will go as planned
2. We feel we have control and can predict

*Terminology by Carol Dweck, Mindset (Random House, 2006)*
The Threshold of Knowledge is the point at which you have no facts and data and start guessing. The Threshold of Knowledge is difficult to spot because we don’t realize that our brain is automatically filling in our knowledge gaps.

Terminology by Carol Dweck, Mindset (Random House, 2006)
Objective of a Good Coach – Move Mindsets

Mindset 2: An Adaptive Mindset*

With this mindset you learn to operate in two zones simultaneously:

The **Zone of Apparent Certainty** + the **Zone of Uncertainty**

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**In the Zone of Uncertainty:**

a. There is a dilemma: We want to make the best possible plan, but the optimum path will only be known in hindsight
b. There are unanticipated obstacles
c. You acquire/increase your knowledge as you go

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*Terminology by Carol Dweck, Mindset (Random House, 2006)
Obstacles are the HEART of the Matter

1. What is the Target Condition?

2. In your Current Condition, what is your Actual Condition now?
   a) What was your Last Step?
   b) What did you Expect?
   c) What Actually Happened?
   d) What did you Learn?

3. What Obstacles do you think are now preventing you from reaching the target condition?
   3a. Which one (obstacle) are you addressing now?

4. What is your Next Step? (next PDSA/experiment)
   4a. What do you expect?

5. How quickly can we go and see what we have learned from taking that step?
Remember we **PDSA against Obstacles**

“We don’t PDSA to achieve the Target Condition.
We PDSA against obstacles.”

“When you are vague about everything then you are always happy with whatever you get”

We must be specific when writing obstacles. We must avoid being vague. Common vague obstacles are the following:

a. Training
b. The Doctor
c. The Nurses
d. A statement that simply says we aren’t operating the way the target says
e. Etc.
Remember we **PDSA against Obstacles**

“We *don’t* PDSA to achieve the Target Condition. 
*We PDSA against obstacles.*”

We must **not** embed possible solutions in our obstacles.
Remember we PDSA against Obstacles

3. **What Obstacles do you think** are now preventing you from reaching the target condition? Which one (obstacle) are you addressing now?

When the coach asks the question, s/he is curious about what the learner/improver believes are the unresolved issues, sources of variation, problems, etc. that are preventing the process from operating routinely the way it should (as defined by the Target Condition).
Be more **Specific** in writing **Obstacles**

**But How?**

Let’s look at a **few** approaches?
Remember we **PDSA against Obstacles**

“We don’t PDSA to achieve the Target Condition. We PDSA against obstacles.”

3. What **Obstacles** do you think are now preventing you from reaching the target condition?

3a. Which one (**obstacle**) are you addressing now?

Here is a test; complete this sentence:

“We can’t (describe the target process) because ________.”

Following the word “because,” **read the obstacle verbatim.** Read exactly what it says on the obstacle parking lot. Word for word. If that does not make a grammatically coherent statement that makes sense, then the obstacle probably needs to be more specific.
Example from a Well-Known Class Exercise
Example from a Well Know Class Exercise

Many times we want to write a noun or an occurrence as an obstacle:

i. Vague

ii. Hard to define a good PDSA Step

iii. Can’t measure this
Better with **Facts** and **Data**

We *think* we *are there with more description of the occurrence*

**Obstacles**

A. We get ½ built and topple

B. The table is shaky and if we bump then dominos topple

C. Dominos scatter when dumping and fall on the floor

i. More description of the issue

ii. Difficult to define a good PDSA Step

iii. Still can’t measure this
Let’s try Facts, Data, and a Negative Result

or

Writing the Obstacle in the form of a question about the Facts & Data that we don’t know. This is so we can learn more about the Obstacle to the Target Condition (this promotes Go & See experiments).
Let’s try **Facts, Data, and a Negative Result** or

**A Question needing Answers for achieving the Target**

1. When we start on the “branched” area of the pattern, two workers interfere with the work pattern and we topple before completion.

   **Obstacle**
   - How will you measure that?
   - Topple %, and audit of standard work pattern 100%

2. We don’t know a way to prevent bumping the table and have toppled too soon twice in each of the last 2 attempts.

   **Question needing answered**
   - We call out aloud “bump” and count how many times we bump the table.

3. We don’t know a way to prevent dominos from scattering and at least 5 dominos will fall on the floor.

   **Fact + Data**
   - Count the number of dominos that fall on the floor each time we dump.
Obstacles are NOT Action Items

Writing an obstacle using verbs like “need”, “make”, or “training” are dead giveaways that the Learner is resorting to ingrained habits of action item lists resulting from episodic improvement events.

Limit verbs in Obstacle Parking Lots

Training is an embedded solution for a PDSA step. However, lack of knowledge or skill is an obstacle.
Obstacles are NOT “Blames”

Blaming the operation’s current constraints, facts and required practices or job functions are non productive exercises and not obstacle identification which is the Kata way of thinking. As a Kata Coach evaluate your Learner’s Threshold of Knowledge (TOK), coach the Learner to explore innovation, and learn to spot problem lists that cannot be immediately experimented on, so you can coach Learners through obstacle identification.
Obstacles are NOT just Statements & Phrases

How can we measure these statements and phrases?

Statements of fact without the negative results, trends, or the affect on process metrics which are causing a gap between Current Condition and the Target Condition are not obstacles.

Coach your Learners to identify the gap between Current Condition and Target Condition first, then give the facts + data, followed by what the impact on the process metrics, these facts are causing.

This statement could be infinite.....
Obstacles written correctly, with a method of measurement

Facts and Data along with the Negative outcome or a question causing the gap between Current Condition and Target Condition or the negative outcome/result. Don’t write solutions, however write the negative outcome causing the gap – But the true obstacle is what about the method used by the nurses is causing fallout > 30 min.

Here we have Fact + Data + Negative result or as a question needing answered to increase our Threshold of Knowledge (TOK)

The Data indicates how we can measure this obstacle.
# Coaching for improved obstacle definition

<table>
<thead>
<tr>
<th>Obstacle Before Coaching</th>
<th>Obstacle After Coaching</th>
<th>How will you measure that?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not entering patients into Tele-tracking decreases the % of patients by Transport staff</td>
<td>RN Staff not following the target condition discharge process decreases the likelihood that the discharge process will be followed correctly. Therefore the percent of patients presented to transport staff is decreases and the bed status will not automatically change from to “Dirty” which signals EVS to clean.</td>
<td>The percent that is presented to transport staff and the percentage of walk outs &amp; d/c by nursing staff</td>
</tr>
</tbody>
</table>

**Example 1**

**Example 2**

| IV placement documentation increases Order: Begin time | We don’t know the time frame given to RN'S regarding IV placement and documentation time; therefore we cannot determine if the MD orders the IV for CTs first, or if the MD enters all orders in a “batch” which could delay the time the RN is given to place the IV, ultimately delaying Order : Begin time. | Manually compare patient by patient the percentage that were “batch” MD orders vs single orders using the Order : Begin report. |
# Coaching for improved obstacle definition

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<td>All ED staff are unaware of the standard operations procedure of the pivot role in the ED</td>
<td>5 out of 18 RNs understand the standard operations procedure of the pivot nurse in the ED; this results in delays in connecting the pivot nurse and the Med-Surge RNs and this delays getting reports called to proper unit</td>
<td>ED related fallouts. Record and track Bed Assigned : Ready less than 15 min</td>
</tr>
<tr>
<td>Inpatient staff concerns with nurse calling reports that are unfamiliar with patient</td>
<td>Inpatient RNs concerns with ED nurse calling about patient reports that the Inpatient RN are unfamiliar with. Therefore pivot RN can’t answer Inpatient RN questions which increases time to give report and ultimately the Bed Assigned : Ready process metric.</td>
<td>Document and track communication between ED/IP managers/Directors on issues at the time of the event</td>
</tr>
</tbody>
</table>

Example 3

Example 4
## Coaching for improved obstacle definition

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<td>RN's difficult to find or reach</td>
<td>Radiology does not know who in ED to notify for patient location and readiness which increases the Order: Begin time</td>
<td>Track the number of times Radiology calls and cannot get an RN on the phone</td>
</tr>
<tr>
<td>Why does it take so long to get an HCG</td>
<td>Is the process for determining HCG and orders with contrast causing the delay or is it delayed because an order has never placed by the MD until after Radiology asks for HGC? This increases the Order: Begin time.</td>
<td>We will review times manually from Order: Begin reports filtered for HGC orders</td>
</tr>
<tr>
<td>Unsure why we are inconsistent with CHG baths/Peri care.</td>
<td>We are unsure why we are inconsistent with CHG baths; some patients have been documented as getting 2 baths in a day while others have none which results in poor quality of patient care. We are not in 100% compliance with policy and this increases our risk of CAUTI.</td>
<td>Daily CHG bath % compliance with policy via a daily run chart</td>
</tr>
</tbody>
</table>
Dreyfus Model *Skill Acquisition*
5 levels of progress in learning a skill with coaching

What are the characteristics of each skill level when writing obstacles?

- **Novice**: Aware
- **Advanced Beginner**: Able to Do
- **Competent**: Able to Coach
- **Proficient**: Able to Teach
- **Eternal Learner**: Able to Teach

We use the Dreyfus Model Tool to determine what needs to be practiced to increase skill.

Get Better.
Characteristics of a Novice: Obstacles

**Dreyfus Model Skill Acquisition**

5 levels of progress in learning a skill with coaching

a. **Identifying Obstacles**: The obstacles identified are actually actions/solutions instead of a true obstacle.

b. **Articulating Obstacles**: They are articulated as vague obstacles that cannot be experimented against.

c. **Documenting Obstacles**: The learner forgets to update the obstacle list as PDSAs progress. They do not identify clearly which obstacle is being addressed.

d. **Relationship Between Obstacle and Target Condition**: Obstacles do not link to the Target Condition and PDSA.

We use the Dreyfus Model Tool to determine what needs to be practiced to increase skill.
Characteristics of a Adv. Beginner: Obstacles

Dreyfus Model *Skill Acquisition*

5 levels of progress in learning a skill with coaching

a. **Identifying Obstacles**: Obstacles are observed instead of 'word of mouth'
b. **Articulating Obstacles**: Obstacles are becoming more specific, but may not articulate how they can be measured. Not written with facts, data and the negative outcome or metric it is affecting - or not written in the form of a question needing a "Go and See" of the pattern of work.
c. **Documenting Obstacles**: Obstacle Parking Lot is updated as PDCAs progress sometimes with the "nudge" from a coach
d. **Relationship Between Obstacle and Target Condition**: Specific and crisp obstacles that are clearly linked to the Target Condition

ADVANCED BEGINNER
Characteristics of a Competent: Obstacles

Dreyfus Model *Skill Acquisition*
5 levels of progress in learning a skill with coaching

a. **Identifying Obstacles:** Obstacles are observed and discovered during PDCAs

b. **Articulating Obstacles:** Very specific, can be articulated and can be measured if eliminated. Well written with facts, data and the negative outcome or metric it is affecting - or written in the form of a question needing a "Go and See" of the pattern of work.

c. **Documenting Obstacles:** Actively looking for obstacles during the observation of their PDCA cycle and learning reflection

d. **Relationship Between Obstacle and Target Condition:** Obstacles are strongly connected to the Target Condition and PDCA - elimination of the obstacle ties directly to results
Remember this is a **Skill** so you must **Practice, Practice, Practice** . . . . . .

We use the **Dreyfus Model Tool** to determine what needs to be practiced to increase skill.
Obstacles are the HEART of the Matter

Kata is an iterative process!
THANK YOU for the Gift of your Time!

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Focus on the PEOPLE, and the numbers will COME. Focus on the NUMBERS and the people will GO!