Managing for Change:
Strategies to lead effective change and build organizational environment of continuous quality improvement

November 19, 2013
David Green
Session Objectives

• Develop understanding of a model that defines the components necessary for implementing a successful Performance Improvement program

• Understand the leaders role in driving and sustaining change

• Explore the human side of change and how leadership commitment to Performance Improvement is essential for success

• Examine ways to develop a rigorous PI project selection process that has clear “line of sight” to your strategic initiatives
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>1:00 – 1:15</td>
<td>Review objectives and Agenda</td>
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<tr>
<td>1:15 – 1:45</td>
<td>Intro to the Performance Improvement Model</td>
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<tr>
<td>1:45 – 2:30</td>
<td>Integrating Change Management and Change Leadership</td>
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<td>2:30 – 2:45</td>
<td>Break</td>
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<td>2:45 – 3:30</td>
<td>Leading the Human Side of Change</td>
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<tr>
<td>3:30 – 3:45</td>
<td>Activating Strategy and Performance Improvement</td>
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<tr>
<td>3:45 – 4:00</td>
<td>Wrap up and Personal Goals</td>
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</table>
A Performance Improvement Model

Effective PI Program

- Leadership Commitment to PI
- Clear Vision of PI
- Rigorous Project selection
- Operational Accountability
- Measureable results
- Sustainability and Change management
- Project Management Skills
Leadership Commitment To Performance Improvement

The extent leadership provides active visible support for Performance Improvement efforts.

Leaders have a strong commitment to continuous improvement.
Clear Vision of Performance Improvement

Performance Improvement is integral to the organization’s mission.

The importance of Performance Improvement is clearly articulated throughout the organization which drives energy and engagement around PI efforts.
Rigorous Project Selection

Consistent annual process to identify PI goals and corresponding projects that are tied to the organization's strategic initiatives.

Each project has a clear line of sight to a key strategic initiative and its goals/targets are shared throughout the organization.
Measureable Results

There are clear metrics and success measures for the strategic initiatives and the corresponding PI projects.

The metrics are tracked effectively and used to keep projects on track and to measure the impact of the project.
Operational Accountability

There is a culture of accountability in the organization. Operational leaders assure the results of PI projects are implemented and the benefits realized.

There are regular reviews of all key initiatives and projects to monitor their progress and keep them on target for timely completion.
Project Management Skills

Projects are managed effectively with a comprehensive project plan, effective team leadership, and facilitation skills.

There are sufficient individuals trained in Performance Improvement skillsets.
Sustainability and Change Management

Improvements identified in PI projects are effectively implemented and sustained.

The complexity of “change” is recognized and leaders use proven change management techniques and tools to drive acceptance.
PI Model Exercise

• Individually complete the Performance Improvement Assessment for your organization

• Within your group share your thoughts on the assessment

• Be ready to share insights and commonalities
INTEGRATING CHANGE MANAGEMENT AND CHANGE LEADERSHIP
“It is not the strongest of the species that survive nor the most intelligent, but the most adaptable to change.”

*Darwin*
Change Management and Change Leadership

Organizations that are successful at massive change initiatives of this nature are those that develop and implement a strategy that successfully integrates change management (the technical component) and change leadership (the cultural component) into a transformation.

- Most organizations are often very effective at change management - the project plan, the resourcing, and other activities that bring order and predictability to the project.

- While change leadership, which provides a compelling need, a shared vision, and engages stakeholders at all levels of the organization in creating change that is sustained, is often overlooked or even completely absent in large change initiatives.

- The change leadership component to driving major initiatives is especially critical in an organization's efforts at transformation.
Change Management and Change Leadership

Organizations are currently rolling out totally new and integrated EMR infrastructures and we are seeing first-hand how important the prioritization and integration of change leadership can be for project success.

What we are looking for by the first wave of implementation is a committed coalition of system stakeholders and end-users that will be ready to welcome a new EMR system (and the new work flows it creates) rather than fighting against it.
What Leaders Do...

“They don’t make plans; they don’t solve problems; they don’t even organize people. What leaders really do is prepare organizations for change and help them cope as they struggle through it.”

John Kotter
A Sustaining Change Model that Works
“The future will generate even more ambiguity and chaos than we face today. Learning how to raise our individual and collective resilience is not just a good idea—it is imperative”

Daryl R. Conner, *Managing the Speed of Change*
Some Thoughts About Change…
Google Search

7,940,000 hits for Change Management

376,000 hits for Change Leadership
The threats to a health system’s financial health are mounting. Only those that consistently deliver quality and strong margins will remain competitive and ultimately survive—a change and transformation process.
“Change in crisis modes is the easy approach, because everyone wants to get out of the crisis. However, leaders that can set the vision, engage the masses and get them headed in the same direction tend to be transformational leaders. Successful businesses have a culture that fosters change and innovation. Change is so rampant at GE and it’s not all crisis based. The changes that are opportunity based inspire and motivate people to act!”

Rod Roberts, Global HR Manager, GE Healthcare, 10-28-2005

“Crisis makes it easy for a leader to absolve themselves of a critical aspect of leadership: Vision. ... With a crisis, the vision centers around the crisis and becomes survival... that is not the best vision for an organization, as people become frantic, instead of focused.”

Ken Jensen, Product Manager, NTT/Verio, 09-03-2005
The case for change and the reality of change, calls for an organized process for leading and driving change and creating a culture that supports change…
The Foundation for Transformation

The Healthcare Industry is facing several challenges that drive the need for transformation. These challenges include:

1. **Increasing Costs**
2. **Declining Margins**
3. **Resource Utilization**
4. **Increasing Un/Under Insured**
5. **Drive Toward Clinical IT**
6. **Globalization**
7. **Transparency**
8. **Public Perception**
9. **Major Employer Push for Change**
10. **Workforce Issues**

These factors create an Uncertain Transition towards a Future State, necessitating a Transformational Bypass process. The transformational bypass involves addressing the root causes of the challenges to move towards an informed and future-oriented state in the healthcare industry.
Overcoming barriers to change

1. **Culture**
   - Overcome resistance
   - Shape common goals

2. **Alignment and accountability**
   - Ensure clear linkage between improvement initiatives, performance and strategic goals
   - Develop consistent management structure

3. **Sustainability**
   - Put mechanisms in place to monitor and maintain results long-term
Change Acceleration Process

effective

The Key to Change at GE
Leading Change Effectively

Using change as a strategic competitive advantage

Optimizing change effectiveness

A culture that leads through effective change
100% of all changes evaluated as “Successful” had a good technical solution or approach.

Over 98% of all changes evaluated as “Unsuccessful” also had a good technical solution or approach.

What is the differentiating factor between success and failure?
From Your Change Experience...

Elements that distinguish successful from unsuccessful change...
The Change Adoption Equation

Q: Quality of the Technical Solution
A: Acceptance by Stakeholders
E: Effective Results

Our focus

Q \times A = E
Q \times A = E, Simply Stated...

Example:

On a scale of 1 to 10, where 10 is best, you rank “Q” as 8 and “A” as 3

\[ 8 \times 3 = \text{Effectiveness score of 24} \]
But When...

Q = 8, and A = 9

8 × 9 = Effectiveness score of 72!
Leading Change

Creating a Shared Need

Shaping a Vision

Mobilizing Commitment

Making Change Last

Monitoring Progress

Current State

Transition State

Future State

Changing Systems and Structures
# CAP: A Model for Change

<table>
<thead>
<tr>
<th>Leading Change</th>
<th>Having a sponsor/champion and team members who demonstrate visible, active, public commitment and support of the change.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating A Shared Need</td>
<td>The reason to change, whether motivated by threat or opportunity, is instilled within the organization and widely shared through data, demonstration or demand. The need for change must exceed its resistance.</td>
</tr>
<tr>
<td>Shaping A Vision</td>
<td>The desired outcome of change is clear, legitimate, widely understood and shared; the vision is shaped in behavioral terms.</td>
</tr>
<tr>
<td>Mobilizing Commitment</td>
<td>There is a strong commitment from constituents to invest in the change, make it work, and demand and receive management attention; Constituents agree to change their own actions and behaviors to support the change.</td>
</tr>
<tr>
<td>Making Change Last</td>
<td>Once change is started, it endures, and learnings are transferred throughout the organization. Change is integrated with other key initiatives; early wins are encouraged to build momentum for the change.</td>
</tr>
<tr>
<td>Monitoring Progress</td>
<td>Progress is real; benchmarks set and realized; indicators established to guarantee accountability.</td>
</tr>
<tr>
<td>Changing Systems And Structures</td>
<td>Making sure that the management practices (Staffing, Development, Rewards, Measures, Communication, Organizational Design and Information Technology Systems) are used to complement and reinforce change</td>
</tr>
</tbody>
</table>
CAP is...

- A model for effective change leadership
- A flexible/non-linear model used throughout a change process
- A strategy for influencing choices and behaviors
- A way to facilitate commitment and behavioral change through team dialog and action
Leading Change
Translating the Model to Key Questions:

Ask the teams the following questions about the change they are implementing:

1. Who’s leading this change? Do you have the visible, active support of key leaders and other managers? *(Leading Change)*

2. Have you identified all stakeholders in the change (those who will have to do something different as a result of the change or who will feel the impact of the change)? *(All)*

3. Do all stakeholders understand the shared need for the change and know that the status quo is unacceptable? *(Creating a Shared Need)*

4. Can the stakeholders clearly state the vision of what the future state (after the change is implemented) will look like. *(Shaping a Vision)*

5. Do you have a strategy to gain “buy-in” for each stakeholder group. *(Mobilizing Commitment)*
Leading Change
Translating the Model to Key Questions:

6. Have you considered strategies and actions we can implement that will improve the chances the change will be sustained? *(Making Change Last)*

7. How will we drive accountability related to the change? *(Making Change Last)*

8. Have you identified key metrics related to the change – including baseline information. *(Monitoring Progress)*

9. Have you identified a key measure that we will monitor to determine if the change is being sustained? *(Monitoring Progress)*

10. Are there changes in the organization or department system and structures that are needed to support the change? *(Changing Systems and Structures)*
Leading Change Exercise

Select a recent change that was implemented or is being implemented in your organization

Use the ten Leading Change questions to assess how well you have considered key elements of the CAP model and the “A” side of the change

Share within your group and be prepared to report out
Leading Change
Key Components to Any Change

- Effective Leadership
- Engagement Strategy
- Technical Strategy

Q x A = E

Change initiative focused on customer needs (target)
Leading Change

**Focus**
- Has a few key priorities and keeps at them (avoids clutter concept)
- Makes trade-offs which reinforce change
- Works toward win/win as a way to influence

**Time**
- We give our lives to that which we give our time
- Calendar test (time audit)
- Planning

**Passion/Energy**
- Is known for...”Turned on” to right changes
- Seeks and supports new ways to do work
- Personal involvement and models new behaviors
- Keeps moving and trying new ideas

**Communication**
- Recognizes importance and need for ongoing, clear, consistent communication
- Demonstrates ability to listen and respond to key stakeholders’ concerns
Key Mindsets for Change Leaders

Change is Life (That which lives... changes/adapts)

In All Change There is Some Loss (Letting Go...)

Resistance is Normal, Natural, and Necessary

All Change is Choice ... Individual Choice

Each Individual Must Find Their Own Way/Journey
How would you define ...

Mobilizing?

Commitment?

Compliance?
Change and Transitions

*Change* is external, situational; the shifts in mission, strategy, organizational structure, policies, practices, roles, etc.

*Transition* is the internal reorientation process people go through to come to terms with the change and to make the change happen.

*Adapted from William Bridges*  
*Susan Mitchell*
Personal Transitions Model

*Transition*: A three-phase process people go through as they internalize and come to terms with a change

![Diagram of Personal Transitions Model]

*Leading Transition: A New Model for Change* by William Bridges and Susan Mitchell
Personal Transitions Exercise

1. Individually, take five minutes to think of a personal situation that required change. Write down how you felt and behaved:
   - When the change began
   - As you worked through it
   - As you settled into the new way

2. With your table group, discuss feelings and behaviors you experienced at the various times and make note of similarities

3. Debrief with large group
Change and Personal Transitions

Current State → Transition State → Future State

Personal Transitions
Transitions: Emotions & Behaviors

The Neutral Zone

Ending, Losing, Letting Go

Excitement

Anticipation

Confusion

Denial

Productivity

Creativity

Uncertainty

Relief

Confidence

Accomplishment

Renewed Energy

The New Beginning

Look to the past

Look to the future
Letting Go: What you can do...

- Let people know change will happen
- Explain what they can expect
- Give them time
- Talk things over
- Be empathetic
- Train and educate
- Find ways to honor the old way
- Clearly define what’s over, and what’s not
Letting Go: Questions you can ask...

<table>
<thead>
<tr>
<th>Typical Behaviors</th>
<th>Letting Go Questions to Facilitate Dialogue/Discovery</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Anticipation</strong></td>
<td>• How do you feel about the change?</td>
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<tr>
<td><strong>Excitement</strong></td>
<td>• What elements of the change are unclear for you?</td>
</tr>
<tr>
<td><strong>Denial</strong></td>
<td>• What excites you about the change?</td>
</tr>
<tr>
<td><strong>Confusion</strong></td>
<td>• What would help you feel less concerned about the change?</td>
</tr>
<tr>
<td><strong>Frustration</strong></td>
<td>• What are you most disappointed about/excited about when you think about the future state?</td>
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<tr>
<td></td>
<td>• How do you think this change will impact you personally?</td>
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</table>
Neutral Zone: *What you can do...*

- Focus on priorities
- Conduct brainstorming, visioning, planning sessions
- Provide information
- Model the new way
- Explain neutral zone as uncomfortable time that can be turned to everyone’s advantage
- Create temporary policies, procedures, roles, etc.
Neutral Zone: Questions you can ask...

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<tr>
<th>Typical Behaviors</th>
<th>Neutral Zone Questions to Facilitate Dialogue/Discovery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experimentation</td>
<td>• What role could you play in helping with this change?</td>
</tr>
<tr>
<td>Uncertainty</td>
<td>• What would you suggest we do differently to help drive this change?</td>
</tr>
<tr>
<td>Absenteeism</td>
<td>• What keeps you from being excited about this change?</td>
</tr>
<tr>
<td>Confusion</td>
<td>• What questions do you have?</td>
</tr>
<tr>
<td>Ambivalence</td>
<td>• How do you think this change will impact you personally?</td>
</tr>
<tr>
<td>Anxiety</td>
<td>• What are you worried about?</td>
</tr>
</tbody>
</table>
New Beginnings: What you can do...

- Set long-term goals
- Concentrate on building a team
- Validate those responding to the change
- Provide information
- Listen
- Be empathetic
- Ensure everyone has a part to play
- Ensure policies, procedures are consistent with the new way to avoid mixed messages
New Beginnings: Questions you can ask...

<table>
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<tr>
<th><strong>Typical Behaviors</strong></th>
<th><strong>New Beginnings Questions to Facilitate Dialogue/Discovery</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Confidence</td>
<td>• What do you want to ensure we continue to do (relative to this change)?</td>
</tr>
<tr>
<td>Accomplishment</td>
<td>• What will keep you energized (relative to this change)?</td>
</tr>
<tr>
<td>Relief</td>
<td>• What concerns did you have about the change that you would describe now as “nothing to have worried about”?</td>
</tr>
<tr>
<td>Renewed Energy</td>
<td>• What are you most proud of (relative to your role in this change)?</td>
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</table>
Define Effective Communication
The Definition of Communication

Communication is the **Process** that takes information and transforms it into understanding.
Communication Flow

- **Message**
- **Sender**
- **Receiver**
- **Feedback**
<table>
<thead>
<tr>
<th>What People Want</th>
<th>What People Get</th>
</tr>
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<tbody>
<tr>
<td>Empathy - listening to their feelings in non-judgmental way</td>
<td>Autocratic behavior - orders, tasks, assignments</td>
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<tr>
<td>Information - why is the change needed</td>
<td>Avoidance - unwillingness to discuss concerns or uncomfortable w/emotions</td>
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<tr>
<td>Ideas - suggestions, options and coaching to help them get “unstuck”</td>
<td>Insincere cheerleading</td>
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</tbody>
</table>
Role of Leader/Communicator

Pitching

Facilitating Understanding
Communication

Manager View

Event or Product
Examples:
“E-mail”
“The Newsletter”
“The Intranet”
“A Videoconference”
“A meeting”

Employee View

A Process
“How will this change impact how I do my job?”
Examples:
Performance feedback,
Market information,
Recognition
Importance of Consistency

Don’t let the message get stuck in the middle and fail to reach employees.
“Full-Circle” Communication

Questions your communications need to answer during change:

- How can I help?
- What’s the change?
- Why are we doing it?
- What’s in it for me?
- Where do I fit?
- Where are we headed?
Best Practice Principles

Determine your **key stakeholders**.

Then...

- Design a **simple process**
- Deliver **consistent messages**
- Utilize **effective vehicles**
- Build in **feedback loops (listening plan)**
# Communication Plan - Telling

<table>
<thead>
<tr>
<th>Audience</th>
<th>Objective</th>
<th>Message(s)</th>
<th>Media/Methods</th>
<th>Timing/Frequency</th>
<th>Who/When/Where</th>
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## Communication Plan - Listening

<table>
<thead>
<tr>
<th>Audience</th>
<th>Purpose for Listening</th>
<th>Media/Methods</th>
<th>Timing</th>
<th>Key Listener</th>
<th>Response Process</th>
<th>Who/When/Where</th>
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Exercise

• Consider leader behaviors, actions or characteristics that you expect good leaders of change to demonstrate

• Individually write down 2 behaviors or characteristics that you do well and 1-2 behaviors/characteristics that you would like to improve

• Identify 1-2 actions you can take in the next 14-30 days to improve on those behaviors

• Pair and share
Defining & Embedding Expectations

Putting Strategic Goals in Action
Defining & Embedding Expectations

Definition: A goal is an end toward which you direct some specific effort
Goals help:

- Identify expected results and set targets to be achieved
- Measure performance
- Provide clear direction to both supervisor and employee
- Form a common frame of reference around which the supervisor and employee can effectively communicate
- Set expectations
- Establish ground work for measuring and rewarding performance
The GE Management System

Series of executive-driven sessions designed to develop goals and leaders in order to drive results.
Operating Calendar – Performance Management Focus

1st Quarter
Set expectations

2nd Quarter
Execution focused

3rd Quarter
Monitor progress/re-align

4th Quarter
Evaluate performance

Simple but Rigorous
Sample goal setting cascading process

Strategic Initiatives – Performance Standards set

Performance Standards developed at the VP Level

Department Goals developed by Managers/Directors

Managers work with Employees to set goals that will support department goals
Cascading performance standards to an individual employee – an example

<table>
<thead>
<tr>
<th>Accountability</th>
<th>Strategic Initiatives and Performance Standards</th>
<th>Target</th>
<th>Exceptional</th>
<th>Distinguished</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Integration</td>
<td></td>
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<tr>
<td>Val, VP</td>
<td>Human Resources Development Strategy</td>
<td>80% retention in Top Talent</td>
<td>85% retention in Top Talent</td>
<td>95% retention in Top Talent</td>
</tr>
<tr>
<td>Mary, Manager</td>
<td>Development of Healthcare University</td>
<td>Identify purpose, goals and work plans</td>
<td>Implement Phase I</td>
<td>Implement Phase II</td>
</tr>
<tr>
<td>Ed, Employee</td>
<td></td>
<td>Conduct Needs Assessment by Q2</td>
<td>Implement 2 identified educational programs by Q3</td>
<td>Implement 5 identified educational programs by Q4</td>
</tr>
</tbody>
</table>
Developing and **Activating Strategy**

**Guidance**
- Strategic Imperatives
- Metrics w/ Targets

**Strategy Playbook**
- Strategy design – 1 to 3 years
- Tools, templates for consistency
- “Punch list” work plans & programs
- Link to operating plan & budget

**Strategic Reviews**
- Performance vs. Plan
- Identify gaps – action plans
- Adjust where necessary
- Initiate new projects

*Start with the answer*

*Create strategy with “legs”*

*Intense focus & accountability*
An Organization’s Strategic “flow down”

- Clear high-level strategic focus and priorities
- Effectively programming the work of our organization and ensuring that work is strategically aligned
- Leveraging our capabilities to drive progress and achieve our strategy
Strategic Imperatives

Vision / Mission
The Community health center is committed to providing personalized, cultural appropriate, compassionate healthcare services of exceptional and consistent quality to the residents of ABC County.

Strategic Imperatives
- 3% OM
- Error-Free Care
- Service Excellence

Definition of Success
- 3% Margin Financial Viability
- 0 clinical events as defined by measures
- 90% Patients ALWAYS recommended (HCAPS)

Driver Measures
- Cost per equiv D/C
- FTE per AOB
- Cost per D/C
  - labor
  - supply
  - overhead
- 99% accurate charge capture
- 100% compliance w/ Docum standards
- Payor mix
- No sentinel events
- 100% compliance CMS
- No medication errors
- 100% compliance with core measures
## Strategic Initiative Charter (Growth 2)

<table>
<thead>
<tr>
<th>Initiative Name</th>
<th>Initiative Champion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inpatient and Outpatient Surgery</td>
<td>John Pierro</td>
</tr>
</tbody>
</table>

### Objective
- Increase inpatient and outpatient surgical procedures with a priority on profitability by surgery

### Timing
- Start: Jan '06
- M1, M2, M3, Stop

### Key Components
- Develop / drive volume in high contribution margin areas
  - Free up capacity and throughput
  - Backfill capacity with high contribution margin IP cases
- Increase M.D. Satisfaction — scheduling, equipment, and personnel
- Maximize inpatient OR utilization
- Maximize surgery center utilization
- Recruit additional surgeons
  - Expand services in select specialties

### Team
- Leader: Ed Staunton
- Members: Schmidt, DiCarlo, Nolan, Kitain, Dodds
- Support: MD's, Chairs, OR Leadership, Fin, HR

### Outcome / Business Case
- ↑ Net revenue
- ↑ OR Capacity

### Resources / Budget
- Budget for consulting services
- Budget for equipment replacement
- Budget for “Team” OR approach
- ▲ Net revenue
- ▲ OR Capacity

### Timeline

<table>
<thead>
<tr>
<th>Year</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yr 1</td>
<td>$1M</td>
</tr>
<tr>
<td>Yr 2</td>
<td>$2M</td>
</tr>
<tr>
<td>Yr 3</td>
<td>$4M</td>
</tr>
</tbody>
</table>

### Example

## Strategic Initiative Charter (Growth 1)

<table>
<thead>
<tr>
<th>Initiative Name</th>
<th>Initiative Champion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase Market Share – Regional Footprint</td>
<td>John Pierro</td>
</tr>
</tbody>
</table>

### Objective
- Increase primary care and specialty growth by town

### Timing
- Start: 11/05
- M1, M2, M3, Stop

### Key Components
- Identify strategic opportunities by town
  - Evaluate demographic, physician presence, and market share information by town
  - Evaluate competitive environment and payer mix
  - Identify locations for medical office space
  - Identify market expansion opportunities by type of primary care and specialty
  - Identify physician partners and recruit where necessary
  - Secure, build-out and establish physician offices in designated towns

### Outcome / Business Case
- ↑ Primary care and specialty base by town
- ↑ Market share

### Team
- Leader: Kisner
- Members: Haynes, Topalian, Staunton
- Support: Finance, Purchasing, Human Resources

### Resources / Budget
- Real estate services
- Marketing
- Legal services
- Physician recruitment and medical office staffing
  - 1% Increase in Market Share
  - Y1 $2.5M
  - Y2 $3M
  - Y3 $3.5 M
## Strategic Imperative Charter:

**Focus Area:** ________________________________

**Initiative:** ________________________________

<table>
<thead>
<tr>
<th>Initiative Objective</th>
<th>Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Executive:</td>
</tr>
</tbody>
</table>

### Initiative Objective

- 

### Success Measure(s)

- 

### Key Projects (Timing)

- 

### Milestones (2012-?)

<table>
<thead>
<tr>
<th>Start</th>
<th>M1</th>
<th>M2</th>
<th>M3</th>
<th>Stop</th>
</tr>
</thead>
</table>

### Out of Scope (Specify as required)

- 

### Team

**Leader:**

**Members:**

**Support:**

### Resources (High Level)

<table>
<thead>
<tr>
<th>(Tech / Software)</th>
<th>$__</th>
</tr>
</thead>
<tbody>
<tr>
<td>(FTE)</td>
<td>___</td>
</tr>
<tr>
<td>(Capital eq)</td>
<td>___</td>
</tr>
</tbody>
</table>
### Problem Statement:
- Why is this project important to the organization?
- One or two sentences that describe the gap between expected performance and actual performance

### Aim Statement:
- Major goal(s) of project (limit 1-2)

### Measures of Success:
- Key metrics (how will you measure the goals?)

### Scope:
- What’s in and out of scope? (Which pt types, which procedures, which test types, etc.)
- Process Begin & End

### Boundaries:
- Constraints (anything non-negotiable for the project such as “FTE neutral” or “no capital expenses > $500”)
Making Change Last For Yourself:

Take a few minutes to reflect and record:

- What have you learned?
- What will you do differently?

1.

2.

3.
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