



SimplifiHC

HealthCare Advisors Igniting...
Innovative Solutions | Results | Value

All Pro Playbook

TPA



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ABOUT SIMPLIFIHC

SimplifiHC (HealthCare Advisors) was established to simplify the complex healthcare ecosystem by bringing innovative technology and solutions designed for employers, advisors, payers, TPAs, Stop Loss, MGUs, Hospitals, Accountable Care Organizations, and Healthcare Providers, with the very latest technology tools to reduce health plan and member expenses, and improve patient outcomes

Introduction

Welcome to the SimplifiHC LEAN Six Sigma resource booklet | Your path to operational excellence!

Our goal is to streamline the intricate healthcare landscape with cutting-edge solutions for employers, advisors, payers, and providers, with a strong emphasis on **member engagement, improved outcomes, enhanced productivity, and cost management.**

The purpose of this playbook is to provide a simplified approach to defining, measuring, analyzing, implementing, and continually controlling a variety of processes, whether small or large. It's your guide to **navigating the healthcare world like a pro** by taking the first step toward optimizing your business processes and achieving exceptional performance.

We hope you find the tools useful to hone your skills and develop LEAN Six Sigma processes that lead to **reduced waste (work), enhanced efficiencies, improved client communications, and cost savings.**

These pages are filled with tools and techniques to take the mystic out of LEAN Six Sigma, and can be easily edited and implemented.

Instruction

PDF format: PDF allows you to insert all information; Simply open the PDF and click the fields.

Printed format: For the majority of documents, please navigate to www.GoLEANSixSigma.com. for FREE, editable templates.



Impact Effort Matrix

Objective: _____

Sponsor: _____

Stakeholder: _____

	HARD	EASY
HIGH IMPACT		
LOW IMPACT		



DETERMINE VALUE | NON-VALUE ADDED

What is Value Added?

- A project or service customer is willing to pay or wait for.
- Positively transforms a project or service.
- Project or service that has no waste.
- Determine project or service steps; review to determine value or non-value (waste).
- Utilize 1 ½ x 2 inch Post It Notes to outline steps in succession to visually access and easily remove.
- OR Transform to an Excel spreadsheet to populate and chart.



PROJECT OR SERVICE

Steps to Project or Service	List Step 1	List Step 2	List Step 3	List Step 4	List Step 5
Number people involved					
Appropriate flow or wait time (Y N)					
Standard of Work (SOW) outlined					
SOW practiced by all					
Employee confusion short cuts					
Easily train new employee					
Necessary step (Y N)					
Unnecessary step (Y N)					
Challenges or bottlenecks to complete (Y N)					

PROJECT SELECTION | RATING TOOL

Directions: Rate each category (Low to High; 1-5). Add the category scores to for final ratings on each, with the goal to identify the highest score to prioritize engagement.



Category		
Current performance gap (1=gap is small, 5=gap is large)		
Cost to business if NO changes are made (1 = low cost, 5 = high cost)		
Impact on customer satisfaction (1 = low, 5 = high)		
Degree of Waster (1= little or no waste, 5 = much waste)		
Customer can be defined (1= not easily defined, 5 = easily defined)		
Data is available (1= difficult to collect or manually, 5 = easy to identify – electronically)		
Multiple individuals needed to understand solutions (1= single, 5 = multiple)		
Authority to implement solutions (1 = little or no authority, 5= authority)		
Manageable project scope (1 = large scope, complex, 5 = focused, narrow)		
Total Score		

Source: HFM VIP Program



BRAINSTORMING: EXPLORE IDEAS

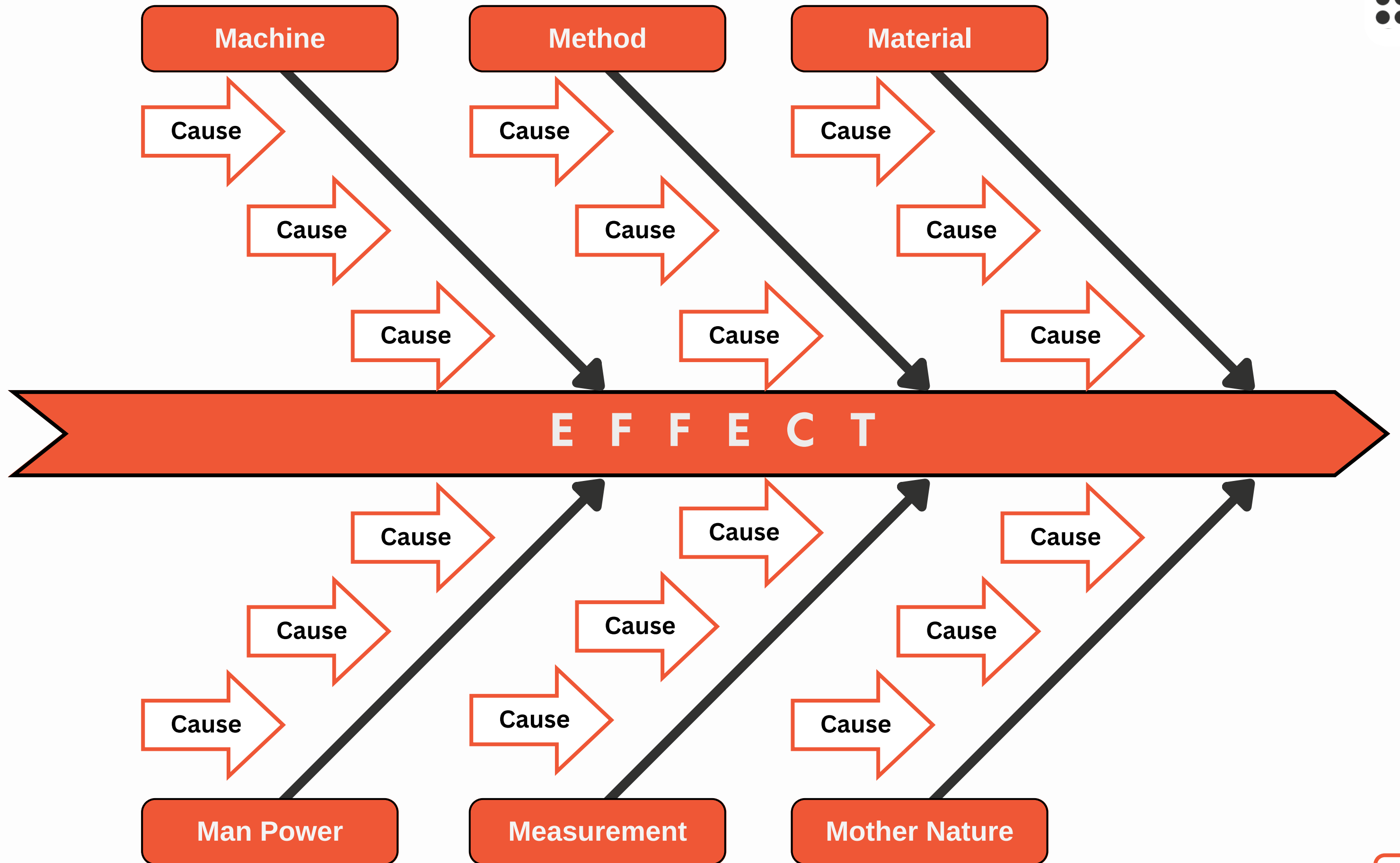
When to use:

- Define a Project
- Formulate Theories of Cause
- Design Solutions
- Identify Potential Challenges
- Steps to Develop New or Creative Ideas

Rules:

- One Person at a Time; Complete Comment (no interruptions)
- Limit Comments to One or Two Minutes Each
- No Judgement
- Record All Comments on Small Post It Notes
- Post All Notes On A Board
- Easy to Determine Value or Non-Value Added (Fishbone or Multi Voting Technique)

Fishbone Diagram





Project:

Out of Scope

System Upgrades

Additional Hiring

Unsure

In Scope

A3: TELLING THE STORY & GAP ANALYSIS



Beginning: Strategy | Problem identification; Reason for Action, Current and Target State.

Middle: Gap Analysis, Solution Approach, Rapid Experiments.

End: Completion Plans, Confirmed State (what it shows with potential future issues)

Reason for Action	Gap Analysis	Completion Plans
Current State	Solution Approach	Confirmed State
Target State	Rapid Experiment	Insights



Title:

Name(s):

Date:

Background:

Why you are talking about it.

What is the business reason for choosing this issue?



Current Conditions:

Where things stand today.

- What's the problem with that, with where we stand?
- What is the actual symptom that the business feels that requires action?



Target(s)/Goal(s):

The specific outcome required for the business.

- What is the specific change you want to accomplish now?
- How will you measure success?



Analysis:

The root cause(s) of the problem.

- Why are we experiencing the symptom?
- What constraints prevent us from the goal?

Choose the simplest problem-solving tool for this issue:

- 5 Whys
- Fishbone

Proposed Countermeasure(s):

Your proposal to reach the future state, the target condition.

- What alternatives could be considered?
- How will you choose among the options? What decision criteria?

How your recommended countermeasures will impact the root cause to change the current situation and achieve the target.



Implementation Plan:

A chart or table that shows actions/outcomes, timeline and responsibilities.

May include details on the specific means of implementation.

- Who will do what, when and how?

Indicators of performance, of progress.

- How will we know if the actions have the impact needed?
- What are the critical few, visual, most natural measures?



Follow Up:

Remaining issues that can be anticipated.

- Any failure modes to watch out for? Any unintended consequences?

Ensure ongoing P-D-C-A

SCREEN PROJECT IDEA



Enter Project Name Below

[Enter Project Name Here]

	Yes or No?
1. Is the word "implement" listed in the description?	
2. Does the phrase "lack of" or "there is no" appear in the description?	
3. Does the idea recommend starting or stopping a particular practice?	
4. Is this process part of the candidate's regular job or are they familiar with it?	
5. Is there anyone in a leadership position willing to sponsor this project?	
Result:	Proceed

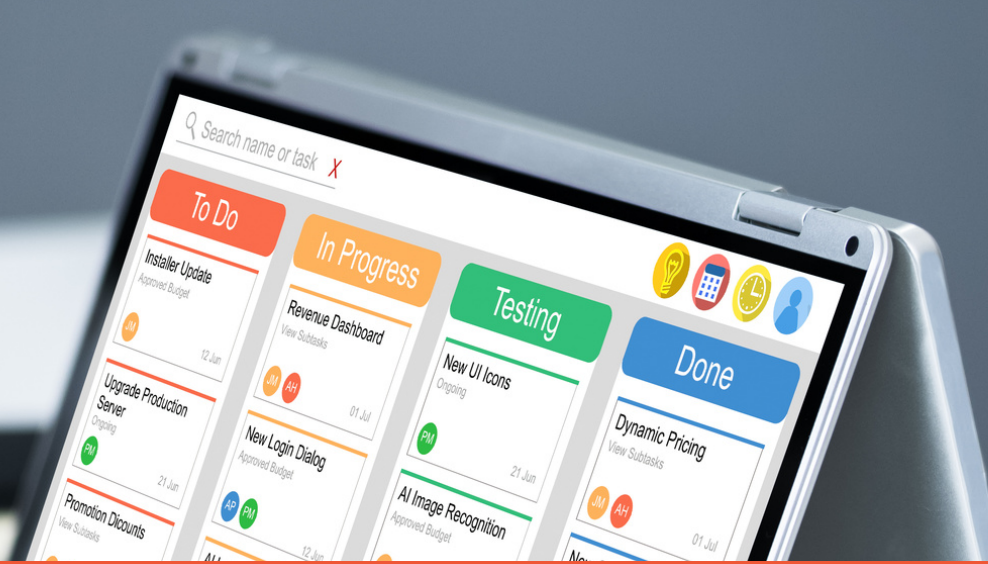
Instructions:

Step 1: Answer each questions with a "Yes" or a "No" based on your project idea

Step 2: Check the result in the blue box

Step 3: If your project is not a "Solution" or a "Decision", proceed to the next tab

www.GoLEANSixSigma.com (free download | editable)



Project Roles

Executive Champion: Senior Executive Management who supports the work being done and is able to remove barriers.

Project Champion: Typically, Director Level or above who has direct supervisory responsibility of the project owner.

Project Leader: LEAN Leader or individual with training leading teams; responsible for ensuring project is scoped, data is collected, implement plans, follow new process, monitor success, and lead events.

Project Owner: Responsible for daily activities and organizes change management when control plan is implemented.

Support: Liaison to overall cross functional team. Formally trained in process improvement and able to facilitate | coach when appropriate.



Project Charter – Setting the Stage

Problem Statement:		Project Champion:	
Business Case (Financial and Strategic):		Project Leader:	
What is the Cost of Poor Service:		Project Owner:	
Goals & Objectives:		Start Stop Points for Project:	
Who are the Customers:		In Scope (focus on specifics):	
		Out of Scope (put in parking lot for later or other project):	

Source: HFM VIP Program

DATA COLLECTION PLAN



Measure Title	Data Type (Continuous or Discrete)	Operational Definition	Stratification Factors (By who/what/where/when)	Sampling Notes (Time Frame, etc.)	Who and How (Person responsible and method - Check Sheet?)
Order Lead Time	Minutes - Continuous	The amount of time (in minutes) it takes from the moment the patron places the order to the moment the order is delivered.	By Time of Day By Server	Sample every 4th customer from 11 - 2 for the next 6 weeks starting 1/30	Host will check the time stamp on the security video
Incomplete Orders	Discrete	Any pick-up order missing the correct supplies including napkins, hot sauce, forks, or knives	None	Sampling all orders for 6 weeks to check for incomplete items	Cashier to fill in the check sheet for incomplete orders

VISUAL MANAGEMENT CHECKLIST

Work Area: _____



	QUESTION	YES	NO
1	Have you boiled the message down to its essence?		
2	Did you use as few words as possible?		
3	Can you say it in pictures instead?		
4	Would color make a difference? (i.e. Green for go, Red for stop)		
5	Would the shape make a difference? (i.e. Arrow for direction, stop sign or hand for stop)?		
6	Have you considered using existing universal signage (steal shamelessly)?		
7	If the signage is in text are you using a printer?		
8	Is the font as big as the space allows?		
9	Have you protected the signage from wear and tear?		
10	is it easy to identify units, materials and equipment?		



Continued

VISUAL MANAGEMENT CHECKLIST

Work Area: _____



	QUESTION	YES	NO
11	Is it obvious where the units, materials and equipment belong?		
12	Is process data updated in a timely manner?		
13	Have you determined the right drumbeat or frequency for updates?		
14	Is it clear who is responsible for the updates?		
15	Is the process flow obvious?		
16	Could a new person walk the process without asking for help?		
17	Could a new person figure out how to operate the equipment i fill out the forms without assistance?		
18	Do people know the ongoing plan?		
19	Are markers, erasers and tools available for user updates?		
20	Are process participants aware they can edit, update and improve visuals?		





Tools:

Ability to clearly and simply state the need for change; to describe the future state, essential for rallying the support and commitment of key stakeholders.

90-120 second pitch; utilized in explaining the project or plan and 'selling' it to stakeholders and/or customers.

- The project or service is about...
- Here's why it's important to do...
- Here is the problem it solves...
- Here's what success looks like...
- Here is what we need from you (or call to action)...

Steps:

1. Review completed work on project scope and team mission; review the need for change and vision.
2. Brainstorm to develop several versions to 'vote' on or use in a Fishbone Diagram.
3. Pitch several elevator speeches to identify gaps and revise to hone in on one that exemplifies the project or service and spurs interest.

Source: HFM VIP Program

GOAL STATEMENT BUILDER



Project Title

[Enter Project Name Here]

		Build the Goal Statement
1. The goal of this project is to: [VERB]	Enter "Decrease" or "Increase"	
2. The unit being measured in this project is: [UNIT]	Enter unit	
3. The measure for this unit is: [UNIT MEASURE]	Enter Y Unit Measure	
4. The estimated baseline of this measure is: [BASELINE]	Enter Project Y Baseline	
5. The estimated target of this measure is: [TARGET]	Enter Project Y Target	
6. The estimated due date for improvement is: [TARGET]	Enter Estimated Target Date	
Final Goal Statement:		
Date from and to range		

Instructions:

- Step 1: Fill in each line with the term or number requested
- Step 2: Estimate data and time frames as needed until firm
- Step 3: Copy resulting Goal Statement into Project Charter

Value of a Communication Plan

Tool to efficiently and effectively communication to many and to ensure all receive the same message, timeline, targets, message, etc.

A communication plan is essential in outlining responsibilities and timelines to efficiently view the project and to provide stakeholders updates.

Finally, the communication plan provides the team assignment (who is responsible) and track to completion in preparation for and guides customer AGENDA meetings.



COMMUNICATION PLAN EXAMPLE



Audience	Message (inform persuade, empower)	Media Channels (written events, one-on-one, etc.)	Who	When/Where

Control Planning

Documented and means to control changes in an analytical, methodical way. Incorporates a dashboard and description in response to data and provides a means of troubleshooting.

1. Identify process step to measure
2. Define measures
3. Draft specifics and targets
4. How will data be collected (see data collection PG. 12)
5. What action will be taken if out of control
6. Who is responsible for taking action

Source: HFM VIP Program



CONTROL PLAN EXAMPLE



Process Step	Measures	Specifics & Targets	Data Collection	Action Required	Person Responsible