

# Topic guide for Digital Diaries

## *For prospective case studies*

The questions below are intended to be a guide to jog your memory and structure your comments on important topics related to the refinement and implementation of Lean/TPS to other systems and practices. As you use the guide, you may find that some of the areas or questions overlap a bit or you may have nothing to report for a particular area and/or question. But, please note if you feel like you have already commented on an issue elsewhere or it is not relevant, at this time, please indicate this, rather than skipping the topic and/or question(s). Finally, be as complete and candid as possible in the time available.

## **1.0. Implementation of Lean/TPS**

### **1.1. Lean Projects: Major Events and/or Decisions**

1.1.1. Please describe the events, tools, and progress of Lean implementation in the past week, including all of the projects or activities in which you were involved.

1.1.1.1. What projects did you or your department complete? What were the projects called? Please describe these projects in a few words.

1.1.1.2. Who participated in these projects? Who led these projects?

1.1.1.3. What were the goals of the Lean/TPS projects this week? Did these goals vary between projects?

1.1.1.4. For each completed project, were these goals or targets met? Please describe any delays to the completion of targets and/or meeting of goals.

1.1.1.5. For each project, how, if at all, did you measure the progress or success of implementing Lean/TPS?

1.1.1.5.1. What type of data or information did you collect?

1.1.1.5.2. How did you collect this data/information?

1.1.1.5.3. Who collected this data/information?

1.1.1.5.4. To whom were these data reported?

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*For example, you had a meeting with all key project staff, you sat in on a related quality improvement or performance report meeting, you visited both clinics for an hour, you provided training to other staff, etc*

1.1.1.7. Please describe specific modifications to implementation tactics or to the refinement of Lean/TPS in your department. Were modifications of tools or tactics necessary for each project or not. Please describe...

1.1.1.7.1. What was the tactic and what changed?

1.1.1.7.2. What was the reason for the change?

1.1.1.7.3. Were clinic staff involved in deciding on the change? If so, describe their role and response.

1.1.1.7.4. What implications, if any, do you expect for this change have on effectiveness of your Lean/TPS approach and on the ability to disseminate Lean/TPS to other departments within your organization?

## 1.2. Facilitators

1.2.1. What facilitated the project team and/or your department's progress toward achievement of their goals during the past week? For each of the facilitators you mention, please describe what made implementation easier.

1.2.1.1. Who was involved?

1.2.1.2. What resources made this possible?

Please remember to consider facilitators at the:

- system level (e.g., top leadership support, project visibility, availability of resources for Lean activities),
- department level
- project team level (e.g., expertise),
- practice level (e.g., leadership, type or size of practice),
- individual physician or staff level (e.g., enthusiasm about intervention),
- patient level (e.g., types of patients seen, positive response to intervention overall or aspects of it).

## 1.3. Challenges

1.3.1. What were the challenges to implementing Lean in your department / organization or to each specific project? Please describe these challenges.

For each challenge you describe...

1.3.1.1 Did you or your staff anticipate these problems? If so, please describe.

1.3.1.2. Who tackled these challenges? Was a particular staff member assigned to address the challenge?

1.3.1.3. How did you overcome these challenges? What did you do specifically?

Please remember to consider challenges at the:

- system level (e.g., lack of visibility, support, or resources for Lean activities),
- department level
- project team level (e.g., competing demands),
- practice level (e.g., lack of leadership, challenges of implementing in a residency practice, disruption of patient flow),
- individual physician or staff level (e.g., some resistant to intervention),
- patient level (e.g., appropriateness of changes made to particular types of patients, negative response to intervention overall or aspects of it).

## **2.0. Unintended Consequences and Lessons Learned**

- 2.1. Have any unintended consequences or effects (positive or negative) of the intervention and its implementation surfaced during the past week (e.g., staff morale improved or got worse, new ways to utilize advanced practice nurses)? If so, please describe.
- 2.2. Based on what the project team and your department have learned to date, what are the insights and/or lessons learned for your own system and practices as well as others? If you were advising others about Lean/TPS and its implementation, what would you most want them to know? What should they be aware of, what should they do, what should they NOT do?

## **3.0. Next Steps/Closing**

- 3.1. What do you have planned for Lean/TPS implementation in your department and/or within a specific project in the next week? Please briefly describe.
- 3.2. Please share anything else you think may be important for us to know about Lean/TPS and its implementation and use in departments like yours, or in other departments.