



Spreading Lean Throughout the Enterprise

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Martin's Point Management System



About Martin's Point

- Not-for-profit health care organization
- Headquartered in Portland, ME
- 7 Health care centers spanning from Portsmouth, NH to Brunswick, ME
 - Mostly primary care + some specialties
 - Approximately 79,000 patients
- Two health insurance plans
 - US Family Health Plan: TRICARE Prime plan spanning multiple states
 - Generations Advantage: Medicare Advantage plan offered in Maine
 - Approximately 88,000 total members
- Approximately 15% overlap (Delivery System patients who are members of our GA or USFHP health plan)



The Martin's Point Management System Team

What is a **Management System**?

The environment and behaviors by which current results are achieved.



Left to Right: Justin Cote, Michelle Gallitto, Bonnie Baker, Janet Spiegel, Madeline Cate, Cameron Shuck

Our Problem to Solve Going into 2016

*“We have been working with our **model line** for over a year, we need to **spread Lean** to the rest of the organization.” –Almost everyone, 2015*

*“We must **empower our employees** to own improvements.” -CEO*

*“We need speed to **action.**” -COO*

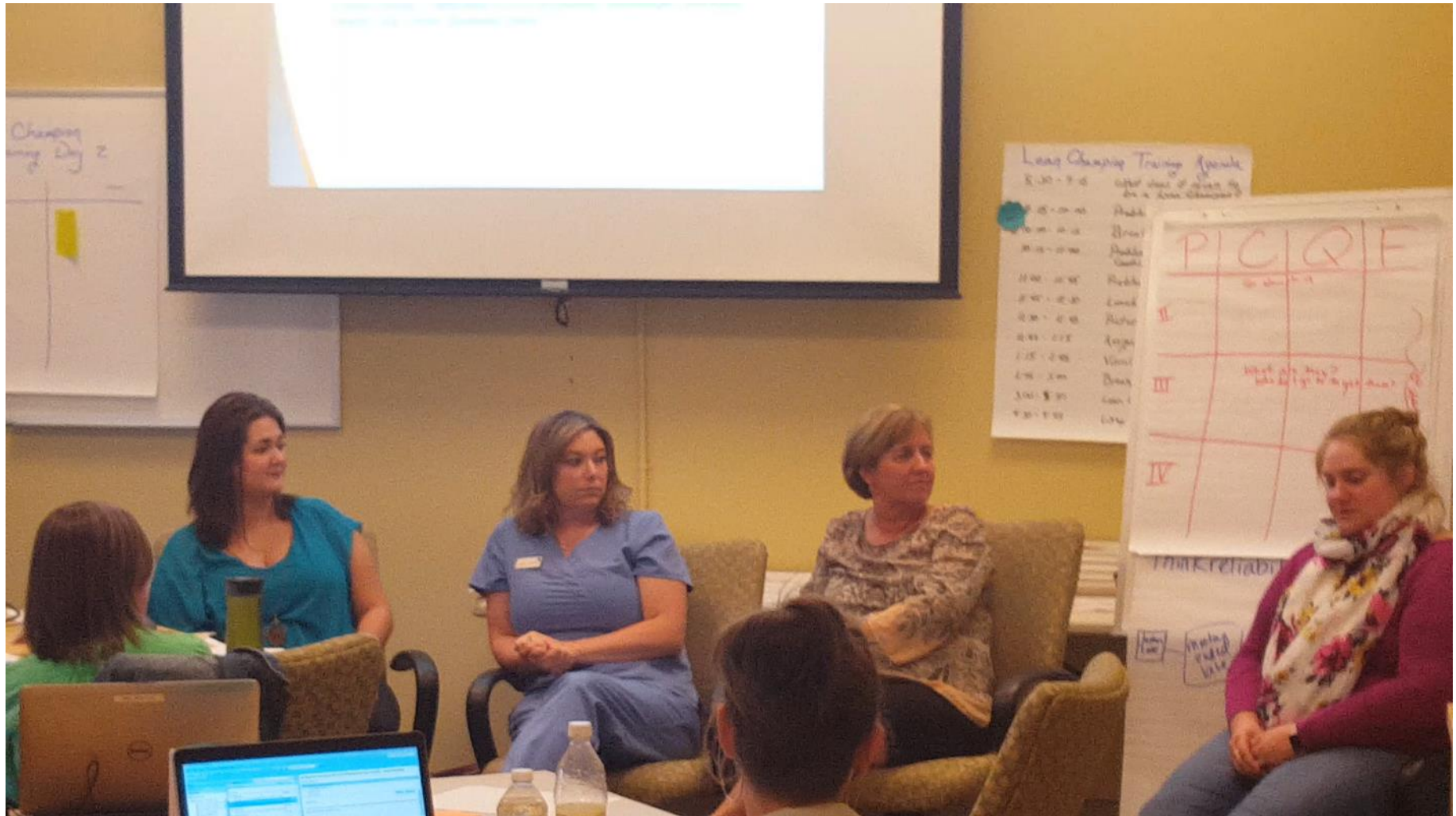
What Does Spread Mean?



Our Lean Vision

***All** employees are providing
ever **increasing value**
to our customers and community, **with ease***

The Outcome (Front Line Staff)



What I Heard

*Affected my
confidence, a lot*

*Built great
relationships with
my peers*

*Exciting to see
them (my
colleagues) get
excited*

*Bigger
understanding of
the organization as
a whole*

*I **e**mpower people*

What you didn't hear but is true:

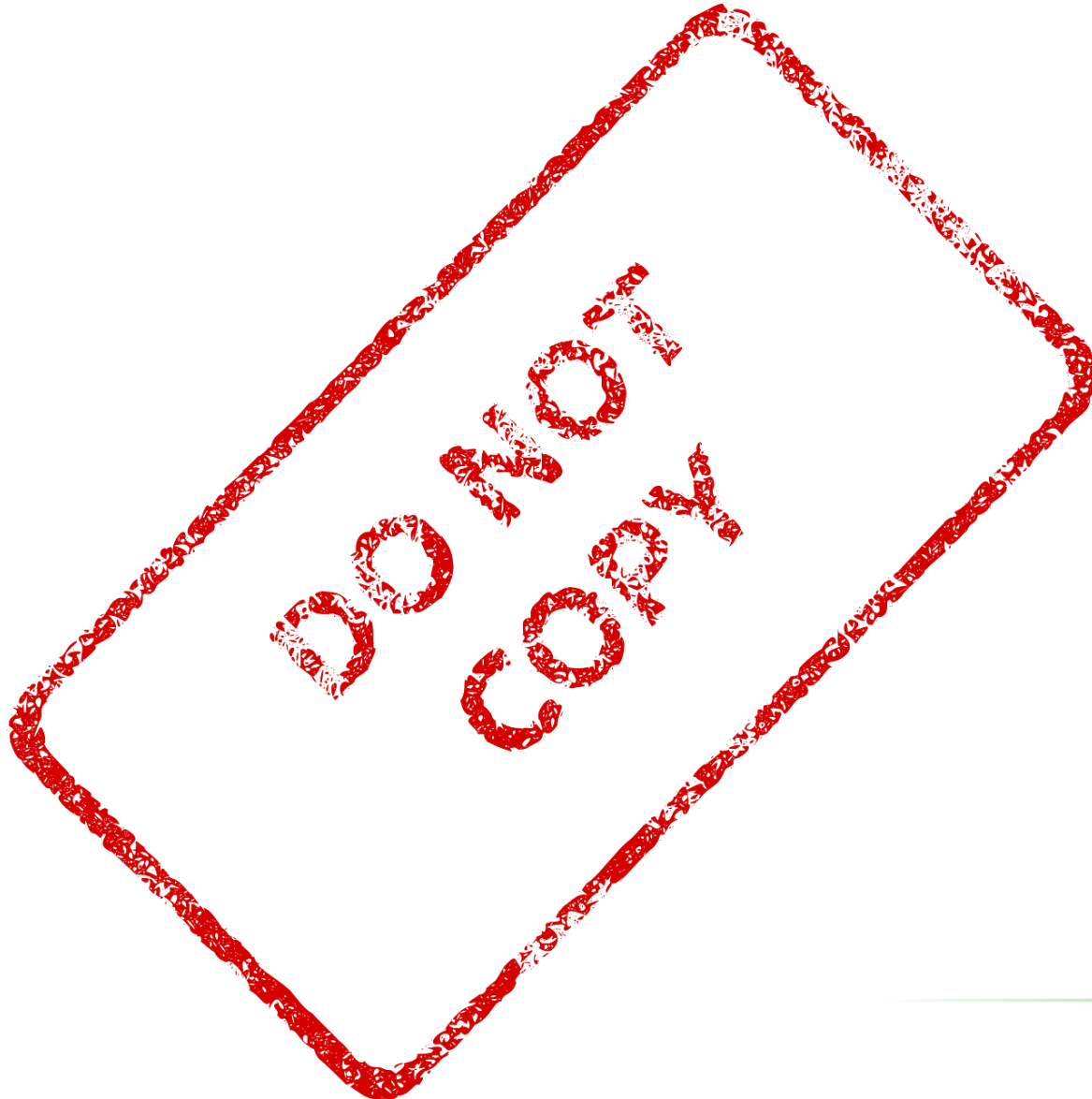
- Multi-million dollar improvement in net margin, decrease in medical loss ratio, 4 point increase on Great Place to Work employee engagement survey score, +8000 net new customers
- *We've seen a greater rate of improvement in the last 6 months than I've seen in my time here. –CEO of 20+ years*

Search for a Solution: Spread Version 1

- Spread from Model Line → 1 other Health Care Center
- 6 Months
- Didn't see culture change. Processes adopted but quickly fell back to old ways. Many processes developed at smaller site needed adaptation to a large site.



Fail



Spread Version 2

- Spread from Model Line → 3 other Health Care Centers
 - Adapt vs. Adopt
 - Spread Package with Non-Negotiable Principles
- 3 Months



Fail



What We Learned

- “Lean” didn’t happen when we weren’t there
- Goals were different at each center
- Once implemented, staff did not know how to continuously improve or evaluate how they were doing

2 Pronged Solution:

- Strategy deployment
- Build the infrastructure for improvement first

Spread Version 3

The adoption of Lean is most successful when:

- Implemented by staff
- Actively supported by leadership
- Coached by knowledgeable Lean Advisors

Started by Aligning Goals

Strategy Deployment

- 5 year strategy
- Yearly Balanced Scorecard leading toward 5 year goals:
 - 4 Measurable Goals at Level 1 (C-Suite)
 - Cascaded through Levels of Leadership to Level 4 (Front Line)
- Visual Management and Improvement Huddles

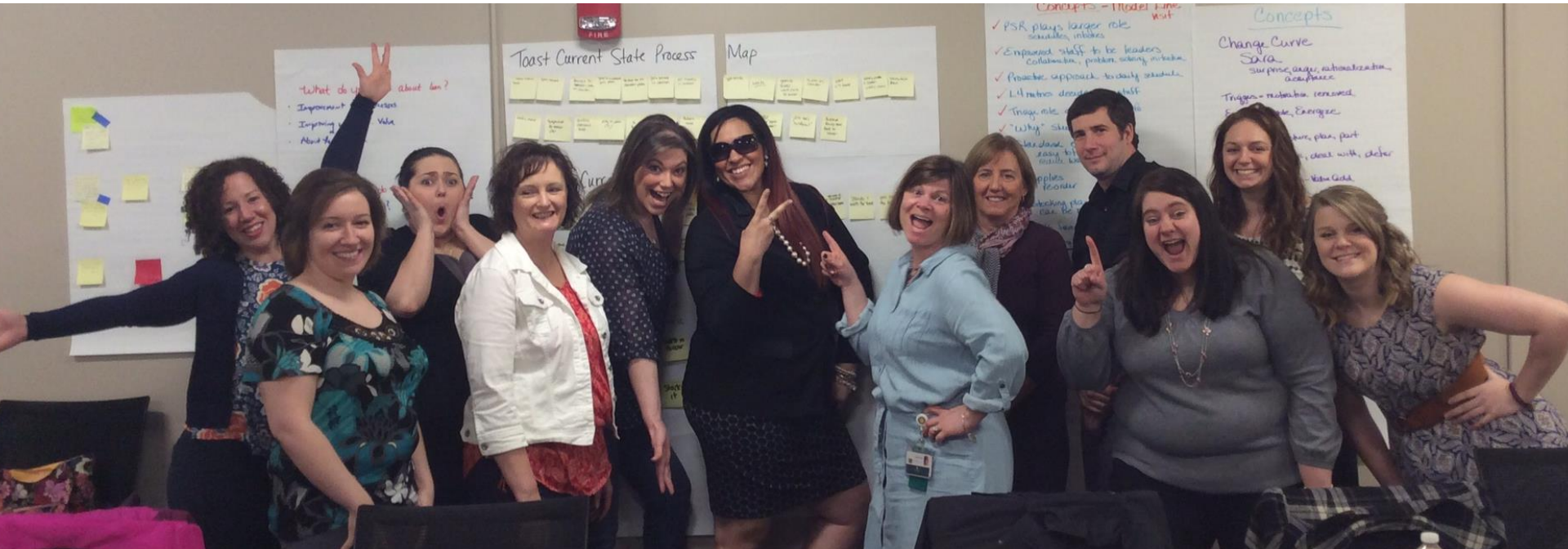
How Do We Build this Infrastructure?

- Strategy Deployment
- 5 year strategy
- Yearly Balanced Scorecard leading toward 5 year goals:
 - 4 Measurable Goals at Level 1 (C-Suite)
 - Cascaded through Levels of Leadership to Level 4 (Front Line)
- Visual Management and Improvement Huddles

Ah ha!

- Lean is 90% People and 10% Tools
- People are the most valuable asset

Invest in your people



Lean Champion

Create Lean Champions at Each Health Center

Responsibilities:

- Becomes the embedded Lean resource
 - Act with urgency to spread and own the lean work
- Educate staff and model lean principles / behaviors
- Visual and metrics management
- Idea system management
- Huddle management
- Attend weekly meetings
 - Lean Advisor support and on-going education
- Attend weekly Lean Champion meeting to share successes, lessons learned, collaborate



Who Should Be Your Lean Champion?

- Supervisor or Front Line Staff
- Shows enthusiasm, passion and commitment to their work and improvement
- Demonstrated ability to lead, influence, and facilitate

Broad Spectrum of Development Opportunities

- Lead cross-departmental problem solving
- Presentations to senior management



Lean Champion Staffing

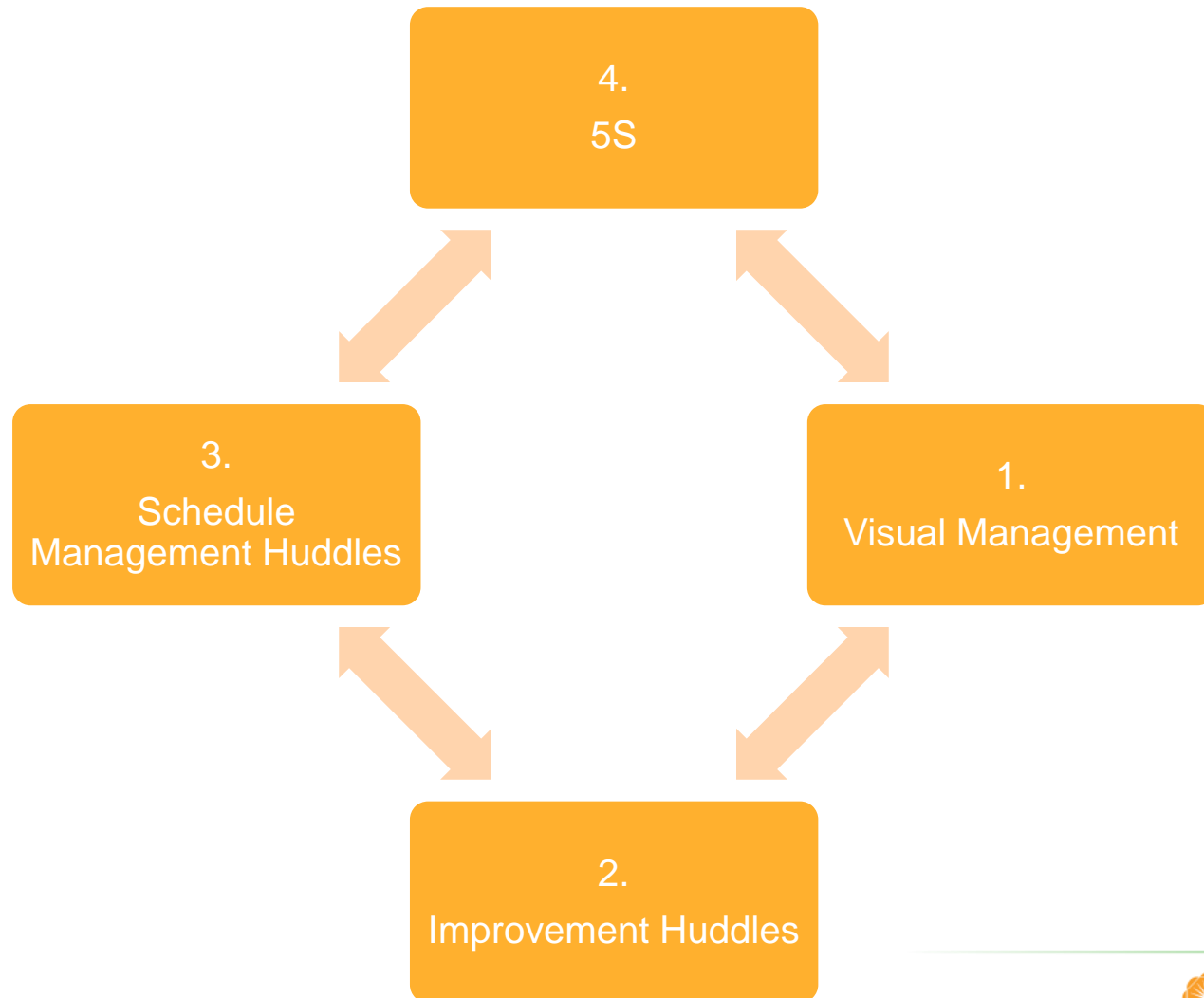
By creating the role of Lean Champion, sites will be able to tap into the expertise and dedication of current staff to take accountability to ensure Lean practices are developed, documented, executed and monitored for continuous improvement.

# of Lean Champions by Site (FTE)	
<i>*dedicating up to 50% capacity to role</i>	
Baribeau (2 Lean Champions, up to 50% time each)	1 FTE
Portland (2 Lean Champions, up to 50% time each)	1 FTE
Biddeford (1 Lean Champion, up to 50% time)	.5 FTE
Gorham (1 Lean Champion, up to 50% time)	.5 FTE
Portsmouth (1 Lean Champion, up to 50% time)	.5 FTE
Farley (1 Lean Champion, up to 50% time)	.5 FTE
South Portland Model Line (1/2 Lean Champion up to 50% time)	.25 FTE

Recruitment and Selection Process



Lean Champion Concepts



Lean Champion Training

- 5 day training course; cohort fashion
 - ½ day shadowing at Model Line
 - Interactive learning and skills assessment by Lean Advisors
 - Define the Lean Champion role
 - Basic Lean principles
 - Creating and monitoring visual management
 - Facilitation of improvement huddles – beginning skills
 - Coaching for improvement ideas – beginning skills

Lean Champion Training Week

Monday	Tuesday	Wednesday	Thursday	Friday
Lean Awareness	Shadow at the Model Line	Problem Solving	Schedule Management Huddles	Visual Management prep, create a Visual Management board
Lean Awareness Train the Trainer	5S and Exam Room Standardization	Powerful Questioning (Questioning for Improvement)	Facilitate an Improvement (process of thinking/approach)	Skills demonstration, Celebrate, and Ceremony with Leadership
Lean Leadership		Improvement Huddles		

Ongoing Lean Champion Support

Weekly Assignments

- Copy of assignment to Site Leader and Lean Champion Manager
- Supported by Assigned Lean Advisor

Weekly Meetings w/Lean Advisor

- 60-90 minute site walk-through meetings
- Site Status/Progress on assignment
- Barriers

Weekly Meetings w/all Lean Champions

- 60 minute conference calls
- Share learning and perceived changes
- Training relevant to upcoming assignments

Example Weekly Assignment

Week 4

Review
Improvement
Huddles at
weekly meeting
with Lean Advisor

- Review huddle process and standard agenda
- Discuss questions and concerns

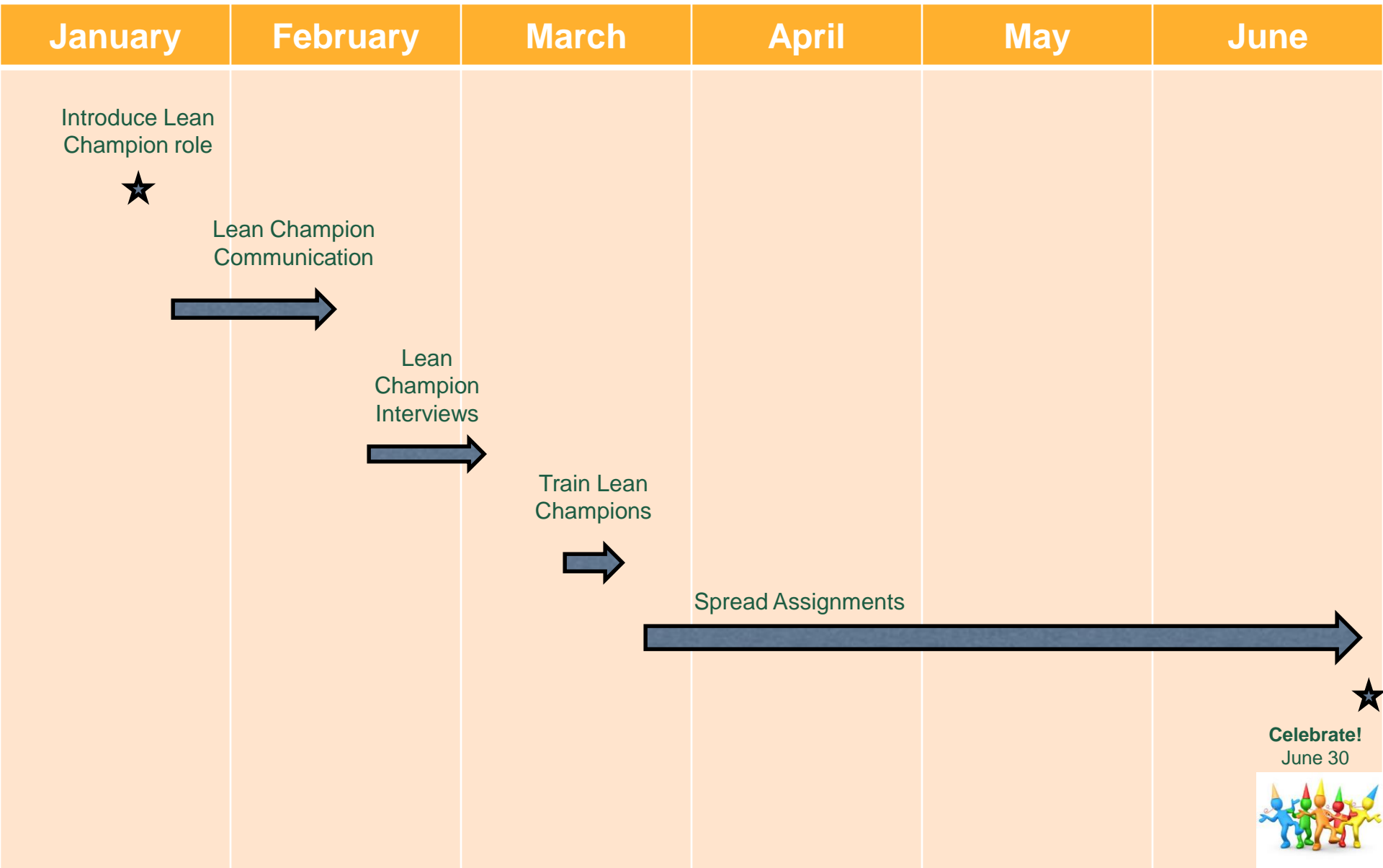
Prepare
communication to
site and distribute
(coordinate with
management)

- Introduce improvement huddles
- Select 2 days and time of day for Huddle, with management
- Include Huddle agenda / process and visual examples

Prep
Improvement
Huddle materials

- Install idea board(s)
- Prepare idea cards
- Prepare standard Improvement huddle agenda

Timeline



Supporting Your Lean Champion

- Provide time to complete their assignments
- Make other resources available to assist, as able
- Be available
- Collaborate
- Support their weekly assignment
 - Understand not everything will be perfect the first time
 - Adopt the assignment
 - Adapt after recommended time
- Encourage their growth as a leader
- Model Lean leadership

Expectations from you as their Leader

- Weekly touch points with your Lean Champion
 - What is going well?
 - What struggles are you having?
 - What have you tried? What was the result?
 - What do you see as one thing we (department) can do to help with this?
 - How can I (Leader) help you overcome these struggles?
- Review weekly Action Items
- Support around time and resources

Where we are now – Spread Version 7

- 51 Lean Champions
 - across the Delivery System, Health Plans, and all Shared Services (HR, IT, Marketing, Executive Admins, Compliance, etc.)
- Average of 51 Opportunities for Improvement (OFIs) completed per month
- Year to date # of OFIs completed throughout the Org (as of 09/07): 501
- 7 Lean Champions have been promoted or transferred into a new role since being in the program

Continued Improvements We've Made

- Condensed JIT training
 - Split 1 week of training out into multiple, shorter training sessions
- Created Lean Champion Guides
 - experienced Lean Champions helping new Lean Champions
- Developed Lean Champion Assessments
 - behavioral assessments of their work areas to be performed 2x/year
- Realized we needed increased training and support from leaders
 - rolled out Leader Standard Work and Kata Coaching

Lessons from our First Lean Champions

- *I **delegated** responsibilities to other team members*
- *I found it helpful to talk to each other and problem solve on what we were up against and **share ideas** with each other*
- *You should **always partner** with somebody*
- *Now it takes me no time, **it becomes natural**.*
- *I worked to **keep the energy up** and keep people engaged*
- *I gained a lot of **self-confidence** in public speaking and group work*
- ***I like numbers** now*
- *My **relationships** with other staff have grown*
- *I have a better **understanding of the organization** as a whole*
- *I've learned to let people put stuff on a shelf you don't think it belongs on*
- *If I went back in time I would have partnered early on and been less of a control freak. I took it all on myself at first and learned that **we have to work together**.*

My Ask of You

Ask yourself tonight:

- Is my current Lean approach 90% people and 10% tools?
- How can I further invest in our people?

Questions and Answers

Your Presenter's radar is locked on your feedback!

This session is:

244 Baker

Are you a future presenter? Contact Jeff Fuchs at jeff@leanmaryland.com about presenting at next year's conference.

