Managing an Idea System

Center for Innovation & Transformational Change (CITC)
Agenda

• Idea System Introduction
  – Purpose
  – Components

• Implementing an Idea System

• How to effectively facilitate an Idea Board Huddle

• Questions
Objectives

- Ability to describe the Idea System
- Strategies to implement
- Awareness of how to facilitate effective huddles
Questions for Thought

• What happens today when you see a problem?

• How can idea systems help?
When they’re empowered to implement their suggestions for improvement

When do people feel respected?
What is an Idea System?

A process and environment for empowering people, allowing for continuous improvement and aligning with True North.

Idea Board + Idea Cards + Team Huddles + Celebration

Seeing and surfacing problems is a good thing!
Principles of the Employee Ideas System

• Improvement is a part of everyone’s job
• Continuous learning to see new opportunities for improvement
• Focuses on achieving organizational goals
• A team process for sharing ideas
• Shared accountability built through performance expectations and following standard work
• A process for celebration, recognition of staff innovation, and focused team work
# IDEA BOARD

## Huddle day and time

<table>
<thead>
<tr>
<th>Idea</th>
<th>Task</th>
<th>Owner</th>
<th>Due Date</th>
</tr>
</thead>
</table>

### Huddle Steps
1. Review metrics
2. Ideas in progress
3. New ideas (if time and open task line)
4. Celebrate!

### NEW IDEAS

### PARKING LOT
(Review every 3 months and move to IN PROGRESS when a task is assigned)

### NEEDS HELP
(Review every 3 months and move to IN PROGRESS when a task is assigned)

### COMPLETED IDEAS
What would you like to focus on?

• Set a clear Aim and Goal(s) for the Ideas. For example:
  – General ideas of all types? Or ideas to address a specific problem?
  – “What gets in your way”
  – Eight Wastes
  – Specific departmental goals
  – Strategic Priorities (True North Metrics)

• Establish General Guidelines around the purpose, problem, or ideas
  – Low to no cost
  – Focused in your area
  – Can be Implemented in 30 days
  – Involves you in the solution
Choose the location

- Idea Board location
  - Common area where all staff have access
- Idea Huddle
  - Schedule them regularly
    - Once a week (or more)
    - Consider noise
    - Can be 5-30mins long
<table>
<thead>
<tr>
<th>Idea</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name(s):</td>
</tr>
<tr>
<td>What is the problem/waste?</td>
</tr>
<tr>
<td>Why is it happening?</td>
</tr>
<tr>
<td>Idea:</td>
</tr>
<tr>
<td>Date Implemented:</td>
</tr>
</tbody>
</table>
Sample Huddle Agenda

5-30 minutes

1. **Greeting /Welcome** - Ask team: Anything new, updates or things to recognize this week?

2. **Choose facilitator/Timekeeper /Assign a Scribe** – Rotate weekly

3. **Go to “Ideas in Progress”/Discuss action items due this week** - Status update, move idea card to next step (if applicable), use teamwork, help each other.

4. **Discuss “New Ideas” (when space is available in task list)** – Why is it happening? Record task on board in “ideas in Progress”, assign owners and due dates...

5. **End meeting when out of time or all ideas in progress discussed. Don’t forget to record implemented Ideas.**

6. **Remind everyone to vote on the “New Ideas” during week (before next huddle)**

7. **Debrief** - How did the huddle go today? What went well?

8. **Celebrate Progress!** Congratulate and recognize team & individual progress!..
Huddle Lead

Meet @ board 5 min prior to huddle to review ideas on board with Huddle Buddy

Role during huddle:
• Review the task list for updates.
• Read & sort (pick chart or by votes) new ideas posted.
• Begin work on a new idea (assign a task, ask questions to the team), if capacity available.
• Celebrate progress!

Huddle Buddy

Meet @ board 5 min prior to huddle to review ideas on board with Huddle Lead

Role during huddle:
• Scribe task list.
• Keep track of time.
• Help Lead maintain group’s focus.
• Be able to step into Lead role if needed.
• Give Lead feedback after the huddle.
**Example Idea**

<table>
<thead>
<tr>
<th>Idea</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name(s):</strong> Nick</td>
</tr>
<tr>
<td><strong>What is the problem?</strong></td>
</tr>
<tr>
<td>Copy machine constantly jams and needs to be restarted and repaired</td>
</tr>
<tr>
<td><strong>Why is it happening?</strong></td>
</tr>
<tr>
<td>Copier is being overworked</td>
</tr>
<tr>
<td><strong>Idea:</strong></td>
</tr>
<tr>
<td>New copy machine</td>
</tr>
<tr>
<td><strong>Date Implemented:</strong></td>
</tr>
</tbody>
</table>
# Questions during the Huddle

## Helpful Coaching Questions

<table>
<thead>
<tr>
<th>IS Asking</th>
<th>Is NOT Asking</th>
</tr>
</thead>
<tbody>
<tr>
<td>What’s the problem are you trying to solve?</td>
<td>Is that really the problem you need to solve?</td>
</tr>
<tr>
<td>How would you describe what’s happening vs. what should be happening?</td>
<td>Why do you think that’s a problem?</td>
</tr>
<tr>
<td>What have you looked at or heard?</td>
<td>Why don’t you look at ___?</td>
</tr>
<tr>
<td>What makes you sure you have a cause/effect link?</td>
<td>How is that your root cause?</td>
</tr>
<tr>
<td>What have you thought of trying?</td>
<td>Have you thought about trying ___?</td>
</tr>
<tr>
<td>What impact do you expect that countermeasure to have?</td>
<td>Are you sure that’s going to work?</td>
</tr>
</tbody>
</table>
Lean discussions in the Huddle

• Ask: “What value does the idea add?”
  – Add value... to the employees experience, to quality & safety, to employee engagement, to financial sustainability

• Ask: “What waste does the idea eliminate?”
  – Aim to eliminate waste from work processes

• Is the problem clearly stated? Do we have a good understanding of the problem and why it is occurring? Does the idea address the root cause?
Mock Huddle – 10mins

• Use example idea board & idea cards

• Discuss the example ideas, use the idea board, and the structure of the idea card
Prioritizing New Ideas: Voting

- Sticky notes (3 per team member) to put on the board before the meeting
  - Can put all 3 votes on one idea, or spread among ideas
- If talking about New Ideas during the huddle, start with the idea with the most votes
- If no votes, then no need to discuss at that time
Prioritizing New Ideas: Pick Chart

- **Implement**
  - Ideas that will be acted upon because they have a high potential impact with few barriers to success
  - Ideas that will be further investigated because they have a high potential impact but with numerous barriers to success

- **Consider**
  - Ideas that might be acted upon because they have few barriers to success, but limited impact
  - Ideas that will not be acted upon because they have little impact and many barriers

- **Possible**
- **Not at this time**

Impact Scale:
- HIGH
- LOW

Impact Levels:
- HIGH
- LOW

Possible Actions:
- Implement
- Consider
- Possible
- Not at this time
Don’t forget to Celebrate!

• Acknowledge and share success:
  – End Huddles on a high note.
  – Thanks!!!
  – Patient/Employee Comments
  – Accomplishments
  – Contributions to waste reductions and value-adding activities
Example Guidelines for Idea Huddles

- Huddles are held regardless of who is/isn’t present
- Suspend judgment of ideas – ask questions instead
- One conversation at a time
- Keep the meeting 30mins or less (assign a time keeper)
- If too many ideas to discuss prioritize 2-3 to discuss at the start of the meeting
- Review the board prior to the start of each meeting
Example Guidelines for Idea Cards

- Low to no cost
- Focused in your area
- Can be Implemented in 30 days
- Involves you in the solution
- Does not contain Protected Health Information (PHI) or Personal Information (PI)
No idea is too small!

- An idea can be as small as changing the types of pens you write with because the ink bleeds less...

- Or having all the computers automatically turn on at 6:30am so they are ready when staff arrive...

- Using the font *Century Gothic* when printing because it uses 80% less ink
Characteristics of Great Idea Systems

- They are managed locally (i.e., by the department)
- Ideas are visible to all
- Group ideas are encouraged
- There is a mechanism for prioritizing
- The implementation/execution of ideas is tracked
- Linked to specific goals (e.g., True North)
- Ideas are reviewed in daily/weekly huddles
- Employees are empowered to implement ideas
- Praise is provided for ideas implemented
Idea Systems can vary & should be tailored to your dept.
Example Celebration Boards
Thank you

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