

# Navigating Rapid Practice Transformation: Creating a Playbook For Success

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# Agenda

- **Introductions**
- Practice Transformation Efforts
- Challenges & Interventions
- Shared Playbook
- Pearls of Wisdom



# Questions for the Audience:

1) Please select the option that best describes your medical group or practice size:

- a) 0-25 providers
- b) 26-100 providers
- c) 101-500 providers
- d) >500 providers

2) Please select the option that best describes your medical group or practice:

- a) Academic Medical Center
- b) Community Medical Center
- c) Private Medical Group or Practice

3) Please select the option that best describes your role in your medical group or practice:

- a) Physician, APN, PA
- b) Nursing
- c) Administration



# Speaker Introductions



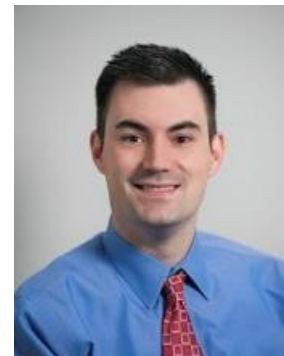
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# The Cleveland Clinic

## Who we are...

- Founded in 1921
- Physician-led
- 2857 employed MDs and scientists
- 44,000 employees
- 1250 bed Main Campus and 9 regional hospitals in Northeast Ohio
- 16 Family Health Centers
- 26 Institutes



# The Cleveland Clinic

## Who we are...

- Ohio
- Florida
- Las Vegas
- Toronto
- Abu Dhabi



# The Cleveland Clinic

## Who we are...

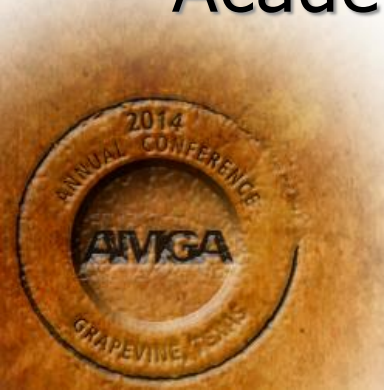
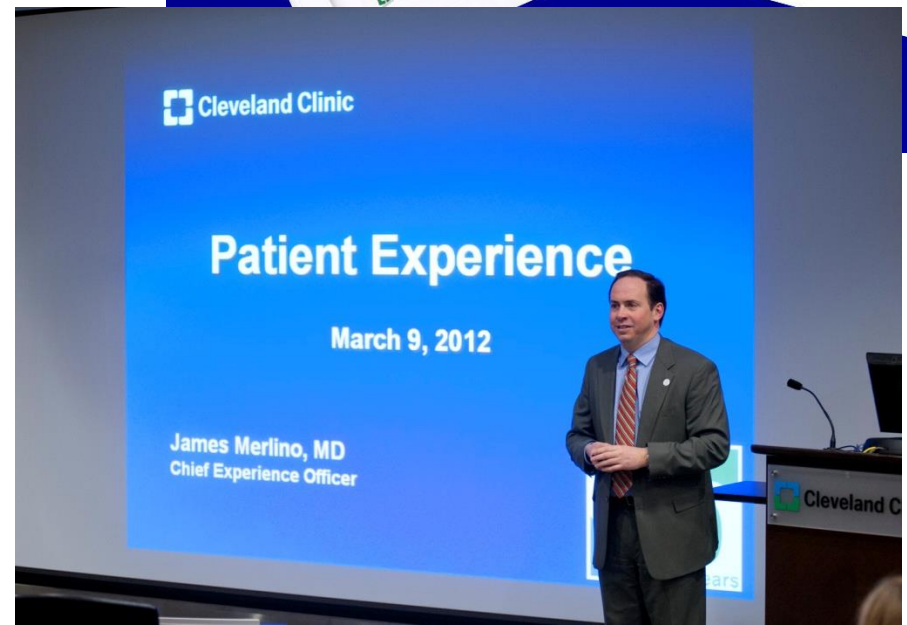
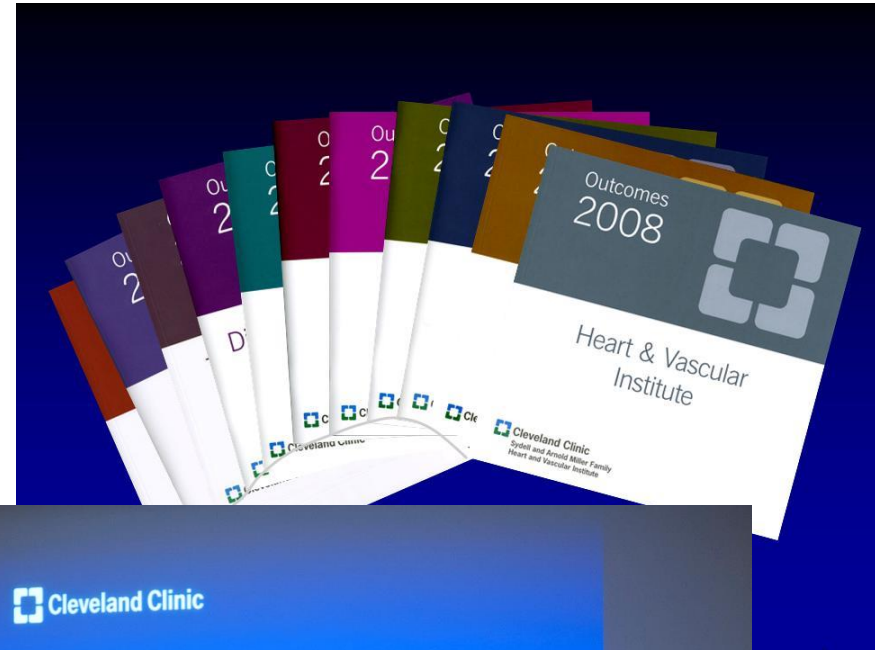
- Medical School
- Research
- Residency and Training programs
- Leadership Academy



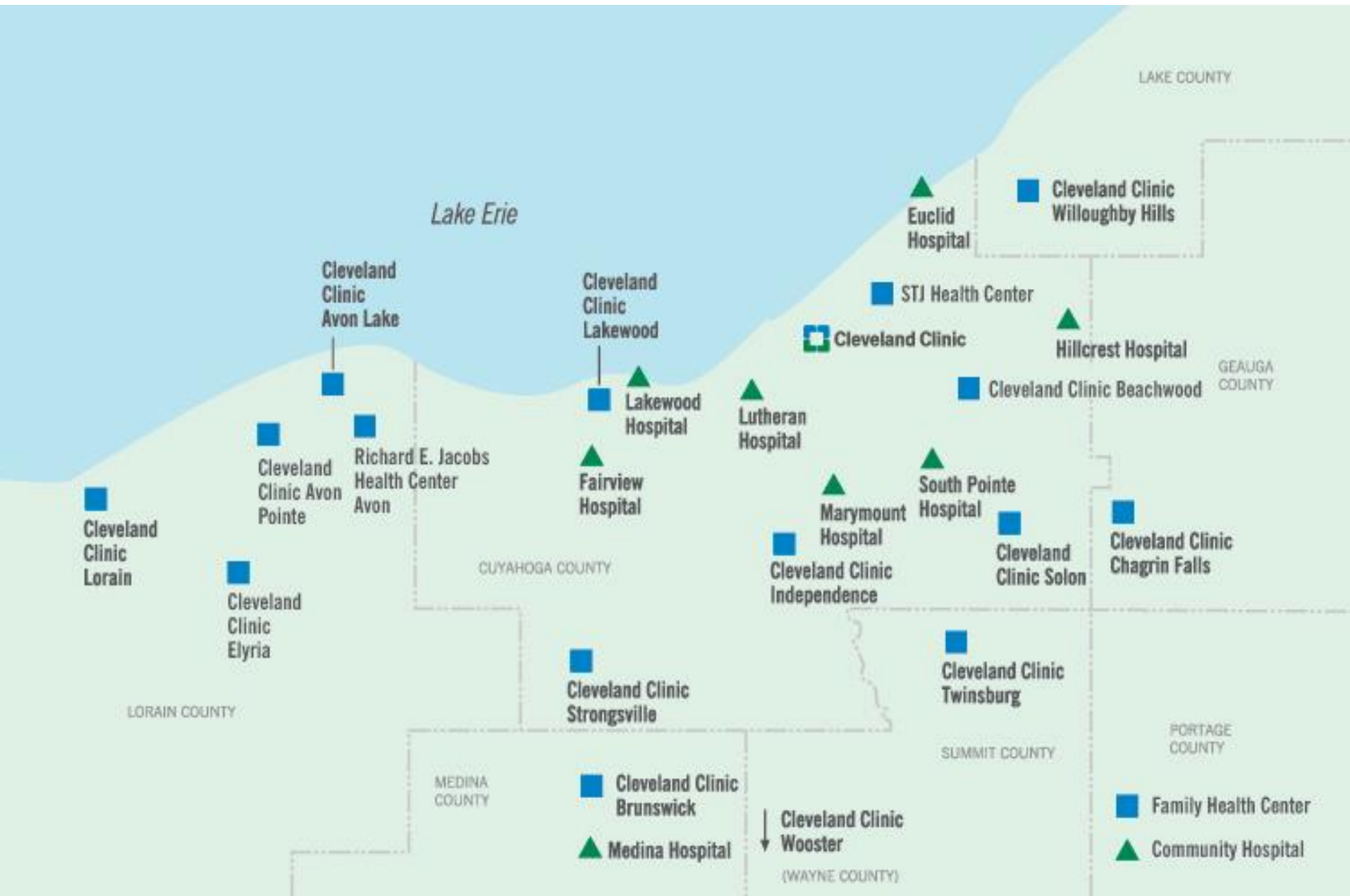
# The Cleveland Clinic

## Who we are... Our Culture

- *Patients First*
- Physician leadership
- Innovation
- Quality
- Transparency
- Wellness
- Academic Mission



# Who we are... Medicine Institute



# Agenda

- Introductions
- Practice Transformation Efforts
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# Questions for the Audience:

4) Have you undergone any *Rapid Practice Transformation*?

- a) Yes
- b) No
- c) Not Sure

5) Please select the option that best describes your experience with *Rapid Practice Transformation*:

- a) It was easier than we thought
- b) It was somewhat challenging
- c) It was very challenging
- d) Haven't had to change a thing- everything's perfect

6) How equipped did you feel to enact *Rapid Practice Transformation* in your medical group or practice?

- a) Extremely equipped
- b) Somewhat equipped
- c) Not equipped

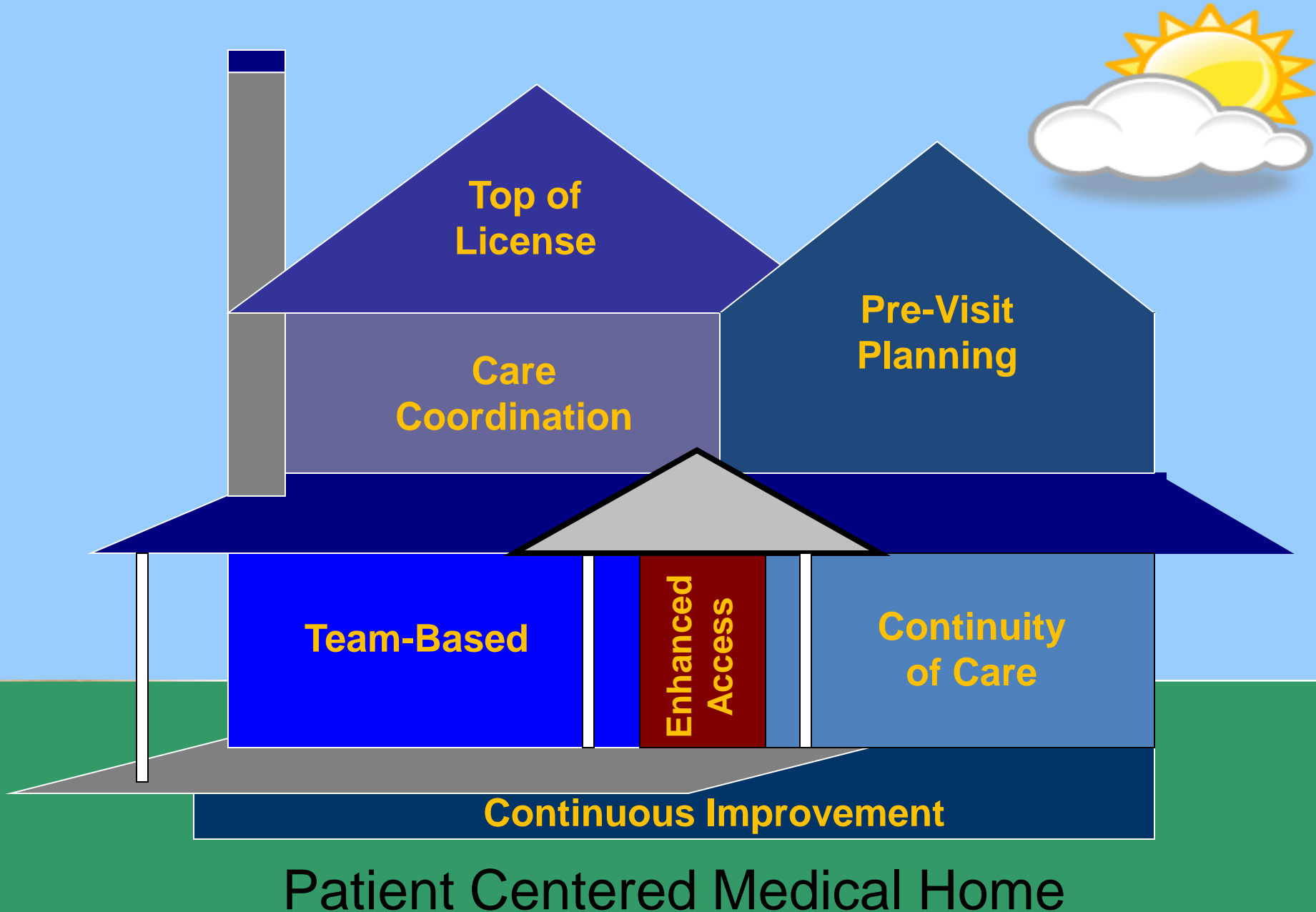


# Scope of Efforts

- 29 sites, 39 practices
- 251 Primary Care Physicians
- 573 non physician FTEs
- Phased implementation:
  - 1<sup>st</sup>: July 2012; last March 2014
- 260,000 total patients



# Our Practice Transformation Efforts



# Our Practice Transformation Efforts

- Impacted day to day of all at front line
- 3 pilot sites, unique models & teams
- Lessons learned used to develop hybrid model, expanded to 39 practices
- Empowered teams
- Resources developed and shared



# Agenda

- Introductions
- Practice Transformation Efforts
- **Challenges & Interventions**
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# Your Experience...

- Think back to a recent successful change you made in your practice
  - What challenges did you face?
  - Interventions?
- Group to develop a shared playbook



## Challenges

## Interventions

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## Challenges

## Interventions

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## Challenges

## Interventions

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## Challenges

## Interventions

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## Challenges

## Interventions

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# Implementation Playbook

**Challenge:** Lack of buy-in from seasoned physicians and employees; lack of understanding

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## **Interventions:**

**What:** Kick-off retreat was held to engage ALL members of the team; communicated vision & goals; provided training on change management

**Who:** All team members in the practice (inc. front-line staff, docs, RNs, MAs, leadership)

**When:** 3.5hr retreat held on a Saturday AM 1 month prior to go-live

**Where:** A convenient suburban location (CC-owned conf facility)

**Why:** To share leadership's vision, generate understanding and enthusiasm

**Outcome:** Majority of the team left with a good understanding and were engaged and excited to participate in our practice transformation initiative



# Implementation Playbook

**Challenge:** Resistance to change from seasoned physicians and employees; lack of front-line representation and empowerment

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## **Interventions:**

**What:** Following our retreat, open call for participation sent to the entire team. This provided every operational area with a voice and opportunity to improve our practice

**Who:** Multi-disciplinary team, including front-line staff, docs, RNs, MAs, leadership, and a Project Manager

**When:** Weekly or bi-weekly meetings.

**Where:** In a conference room within the practice

**Why:** To empower each member of the team, provide each area with a voice, and improve communication throughout the practice (create a serving leader culture)

**Outcome:** Significant involvement from each operational area. Continued involvement in iterative practice redesign phases by the majority of our participants





# SCOPE CREEP

It happens



# Implementation Playbook

## Challenge: Scope Creep

### Interventions:

#### What:

- Developed a detailed project charter
- Outlined a calendar of deliverables with clear goals for the teams
- Utilized "Parking Lot" to capture ideas outside of project scope to be addressed in future phases
- Leveraged project management support and facilitation

**Who:** Project Manager, sponsor, and team leads are all responsible for managing scope creep

**When:** Continuous process

#### Where:

- 1:1 planning meetings b/w Project Manager, Sponsor, and team leads
- During project team meetings

**Why:** To focus efforts on interventions that align with the overall goals of the project, to manage resources, and ensure completion of key milestones

**Outcome:** More efficient use of resources, quicker implementation, idea generation for future iterations of redesign (parking lot), and well-defined goals and objectives prior to implementation.

Project Charter / Business Case				
Project Name				
Authorizations	Name	Function	Date	Signature
Author		Project Manager		
Approved		Project Sponsor		
Project Context & Background				
Expected Business Benefits				
Proposed Start Date		Proposed End Date		
Project Objectives				
Key Outputs / Deliverables				
Project Scope				
Includes				
Excludes				
Success Criteria				
Methodology / Approach				
Project Resources				
Project Steering Group				
Sponsor				
Project Manager				
Project Team Members				
Other				
High Level Estimate of Project				
Costs				
Man/days				
Cost				
Issues & Risks				
Assumptions				
Constraints & Dependencies				
Reporting		Frequency	Who	
Milestones				
Steering Committee meeting			Steering Co. + PM	
Project Team meeting			Project Team + PM	
Reports				
Progress Reports			Sponsor, Steering Committee	
Change Report			Sponsor, Steering Committee	



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# Pearls of Wisdom

- Change is opportunity!
  - Language and energy are critical
  - Change should be iterative
  - Take breaks in-between phases
  - Techniques to maintain momentum are crucial
  - Empower team, this is a team sport
  - Over communicate goals or progress
  - Proactively solicit feedback during progress updates
  - After-action reviews are valuable
- Use our shared playbook! Will be available to download



# Questions for the Audience:

7) How equipped do you feel now to enact *Rapid Practice Transformation* in your medical group or practice?

- a) Extremely equipped
- b) Somewhat equipped
- c) Not equipped

8) How are you doing in your March Madness basketball pool?

- a) I'm killing it!
- b) I was out in the first round!
- c) I had Texas going all the way!
- d) What's a basketball pool?



# Contact Information



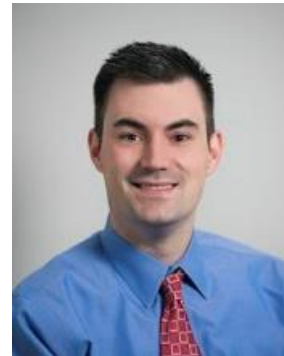
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**Cleveland Clinic**

**Every life deserves world class care.**