



AHA Team Training

The Fundamentals of Strategic Planning and Successful TeamSTEPPS Implementation

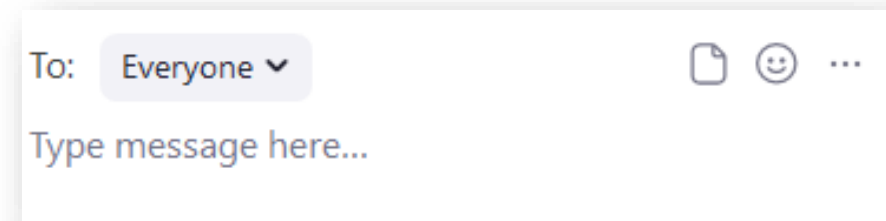
March 13, 2024



AHA CENTER FOR HEALTH
INNOVATION

Rules of Engagement

- Audio for the webinar can be accessed in two ways: 1) through your computer speakers or 2) dialing in by phone – *listen only mode*
- Q&A session will be held at the end of the presentation
 - Written questions are encouraged throughout the presentation
 - To submit a question, type it into the Chat Area and send it at any time
- Other notable Zoom features:
 - This session is being recorded, the chat will not be included in the recording
 - Utilize the chat throughout the webinar. To chat everyone, make sure your chat reflects the picture below:



Continuing Education Credit

To receive 1.0 CE credit hour for this webinar, you must:

- **Create a Duke OneLink account.** You only need to create an account once – you may use it for all future webinars. Instructions will be chatted in and/or you may find them in your registration confirmation email.
 - Step 1: Register for a OneLink account
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- **Text TUXFET to (919) 213-8033 after 1:00 pm ET today – 24-hour window**

In support of improving patient care, the Duke University Health System Department of Clinical Education and Professional Development is accredited by the American Nurses Credentialing Center (ANCC), the Accreditation Council for Pharmacy Education (ACPE), and the Accreditation Council for Continuing Medical Education (ACCME), to provide continuing education for the health care team.



Upcoming Team Training Events

Courses

- [Master Trainer Information Session](#) April 4
- [In-person TeamSTEPPS Master Training](#)
 - March 25-26 at UCLA, Los Angeles, CA
 - April 22-23 at MetroHealth, Cleveland, OH
 - April 24-25 at Houston Methodist, Houston, TX
 - May 21-22 at Tulane, New Orleans, LA
 - June 11-12 at the American Hospital Association, Chicago, IL
 - July 15-16 at Northwell Health, New Hyde Park, NY
- [Virtual](#) TeamSTEPPS Master Training from April 18-June 6

Upcoming Team Training Events Cont.

Webinars

- April 10: The Thin Blue Line: Drifting Reliably Towards a Safety Culture – *registration coming soon*
- Are you interested in speaking on one of our monthly webinars? Check out our [speaker interest form](#) to submit your webinar proposal!

Advisory Services

Custom TeamSTEPPS Advisory Services at Your Organization

TeamSTEPPS Master Training Course

Using a train-the-trainer model, **we give you the foundational tools** and concepts, and train your staff through this **two-day training** program. You will gain a team of Master Trainers ready to teach others in your organization.

Comprehensive TeamSTEPPS Programs

We help you along the way. After delivery of the two-day Master Training course, we continue to work with your team for **3-6 months**, building the internal capacity to hardwire TeamSTEPPS throughout your organization.

[Learn More »](#)

“Our relationship with the TeamSTEPPS faculty and the on-site trainings were both phenomenal. **They did a great job of meeting us where we were** and customized a program that really helped us gain clarity about the problem we’re trying to solve.”

– **Melissa Riffe-Guyer**
Executive Director,
Culture Cone Health

do tank

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Matthew Kelly

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Adam Kohlrus

adam.kohlrus@dotankdo.com

OUR GOAL

WE WILL SHARE A PROCESS AND TOOLS TO SPARK IDEAS ABOUT HOW YOU CAN APPLY A HUMAN-CENTERED DESIGN TECHNIQUES TO YOUR STRATEGY AND INNOVATION.

WE WILL RAPIDLY
BOUNCE BETWEEN
EXAMPLES

WE WILL SHOWCASE
TOOLS/TECHNIQUES YOU
CAN USE

MAKE USE OF CHAT FOR
REACTIONS

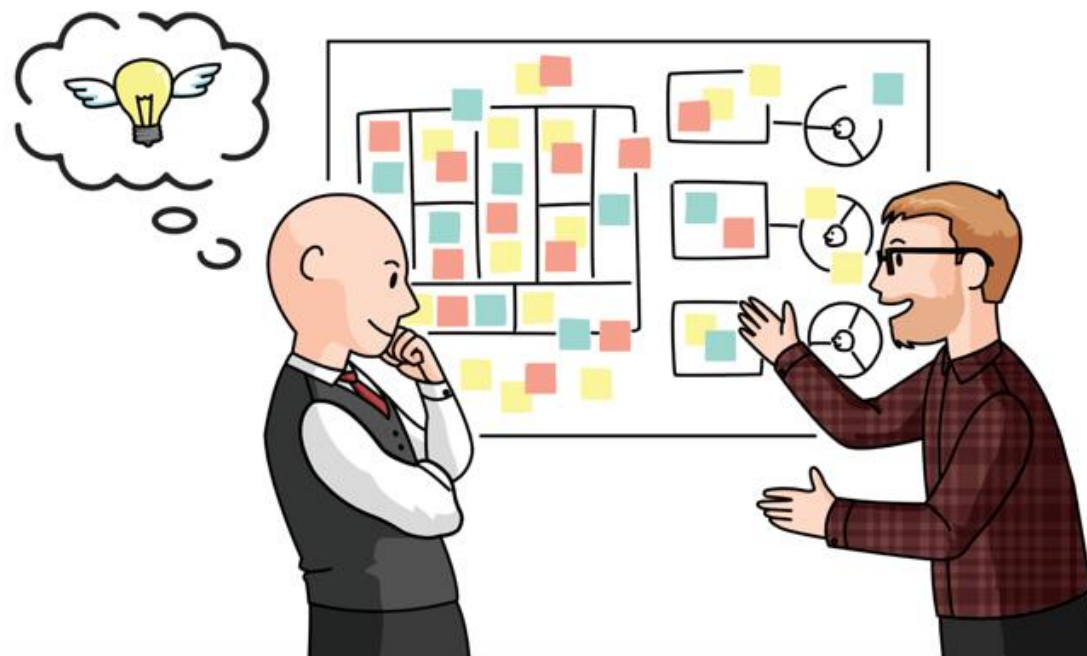
CLIMATE

“

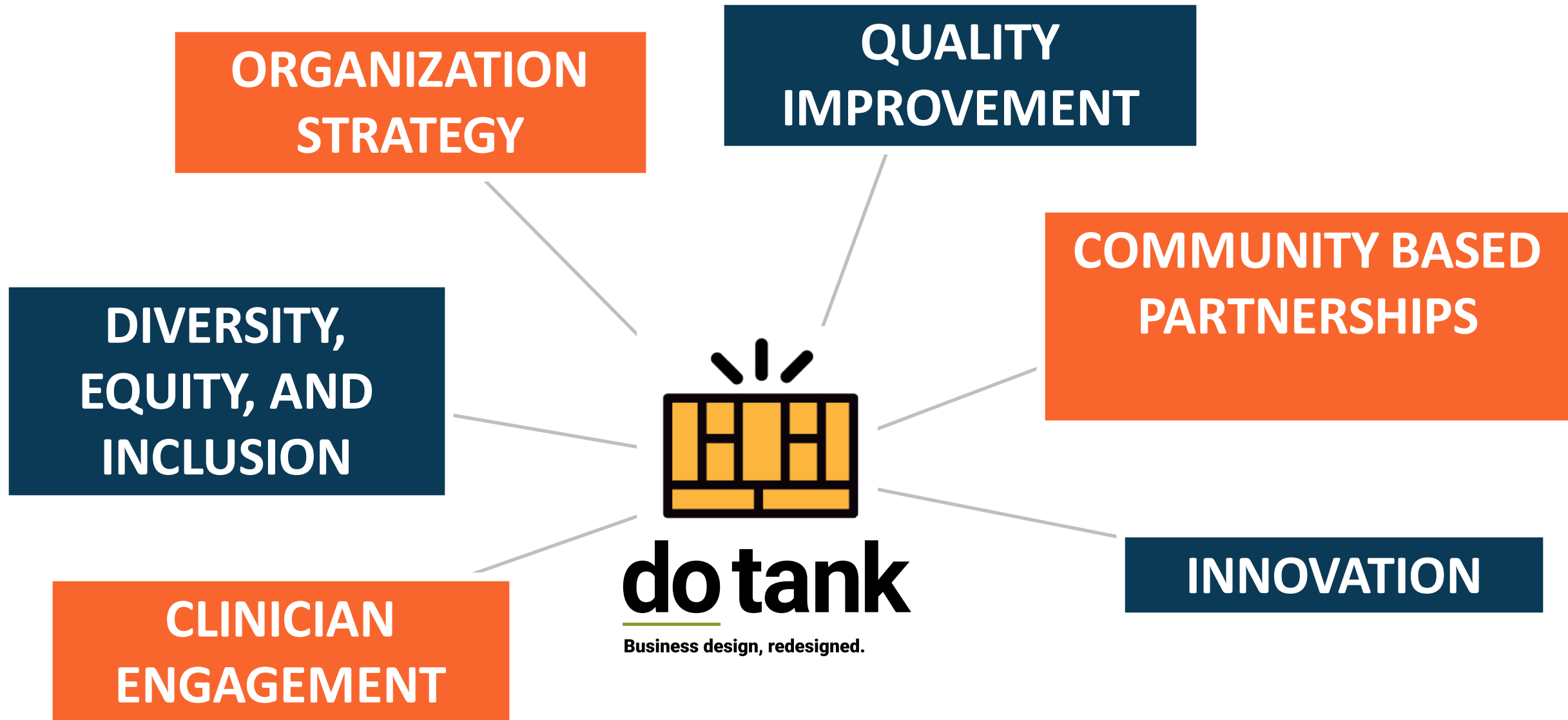
If any field should be human-centered, it's healthcare. We help teams at the intersection of quality, equity, and innovation design a safer, healthier future.

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Strategic Planning is part of all the work that we do

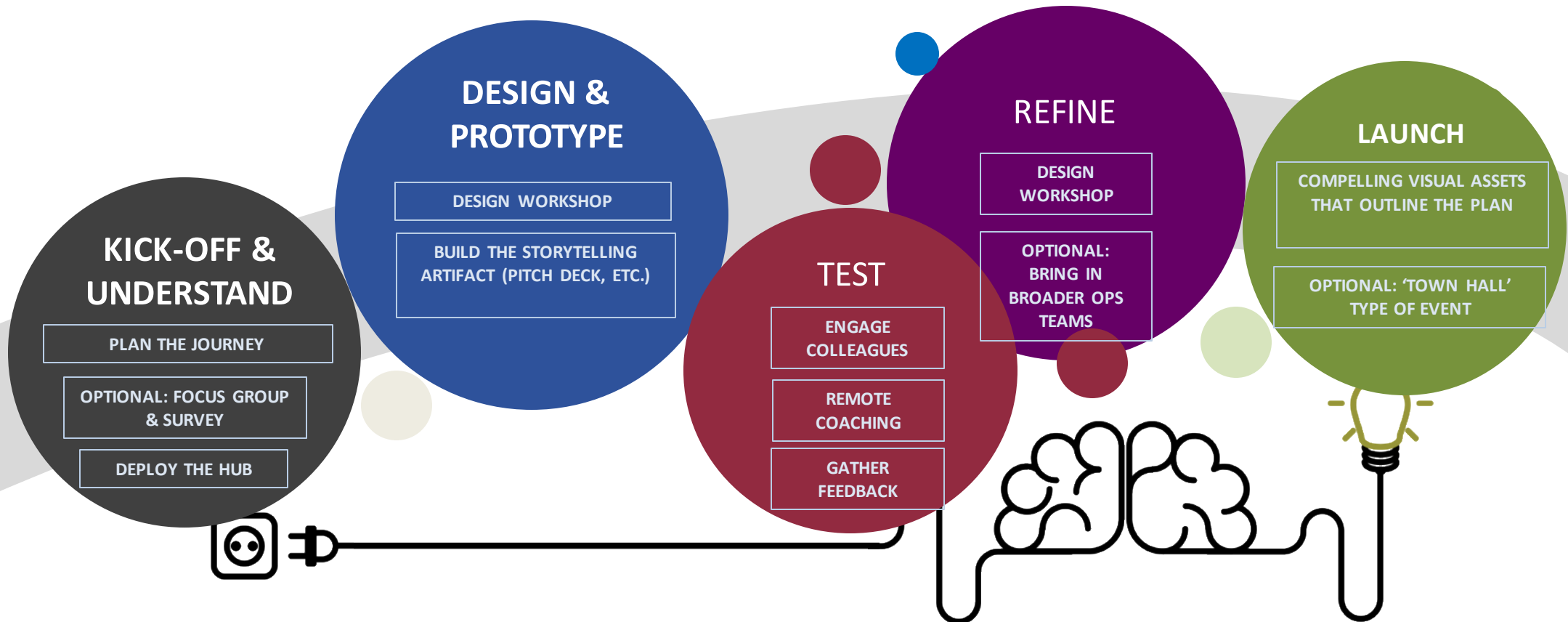


Agenda

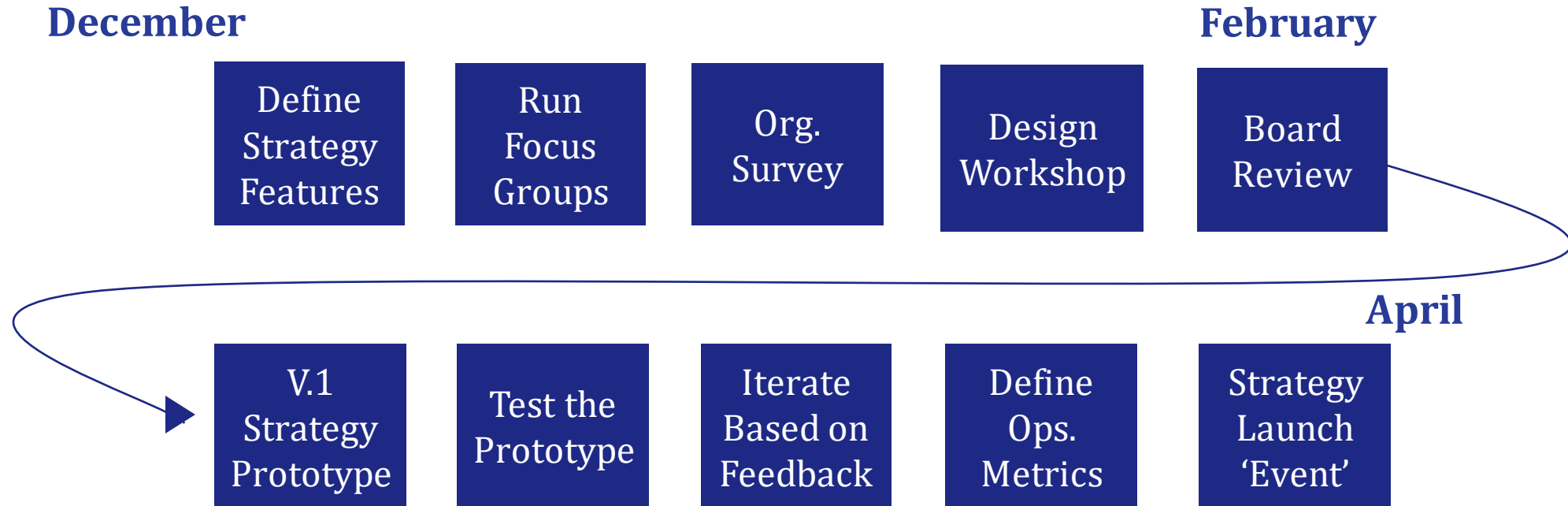
- Welcome and Introduction
- **Design:** Fundamentals of human-centered strategy (Strategic Planning)
- **Align:** Building understanding and ownership (Storytelling)
- **Do:** Moving to action (TeamSTEPPS)
- Questions and discussion
- End



The Strategy Sprint



The Strategy Design Sprint



DESIGN

The Fundamentals of Human-Centered Strategy



1.) Gather the Right Cast of Characters

Gather Intel From Your Stakeholders:

These can include your colleagues, patients, key partners, etc.



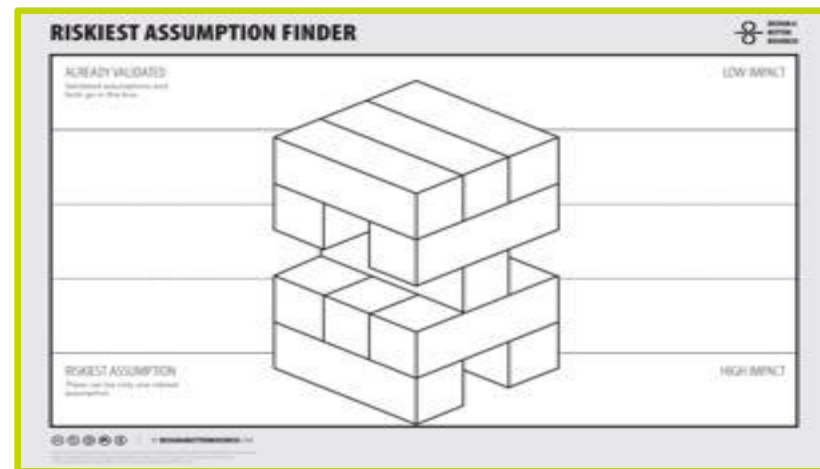
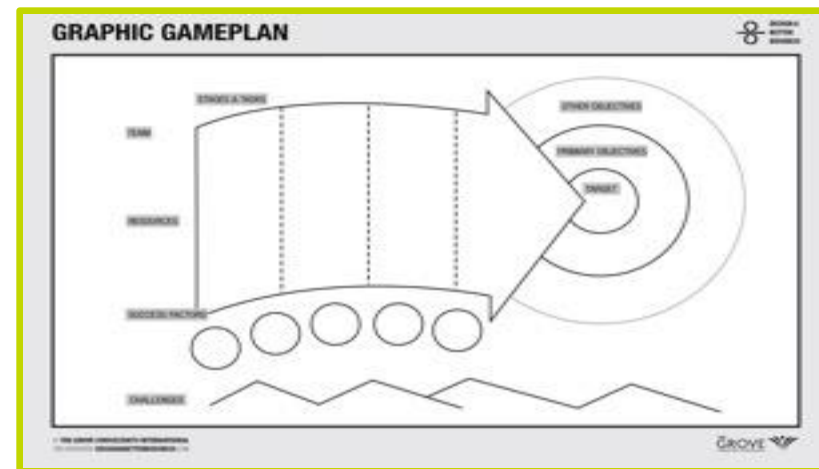
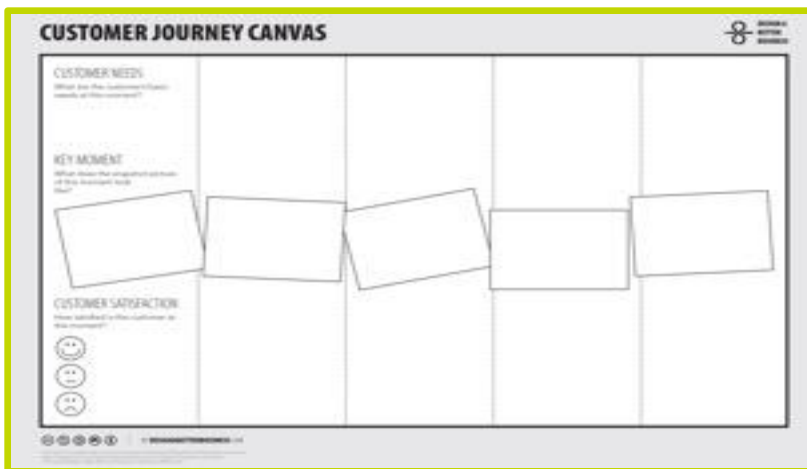
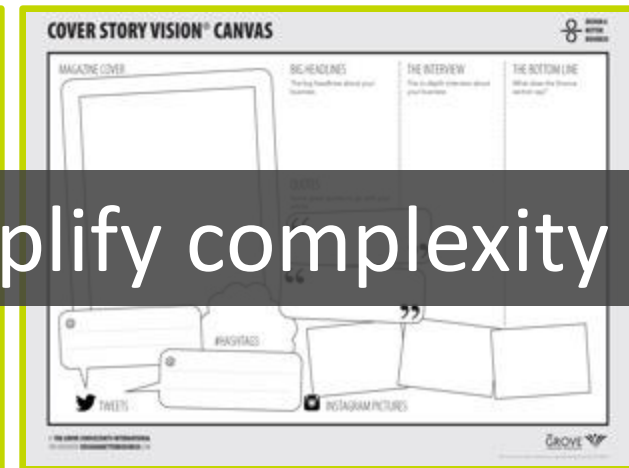
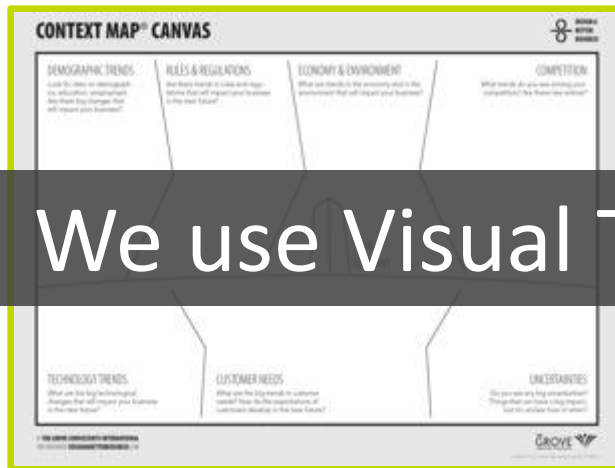
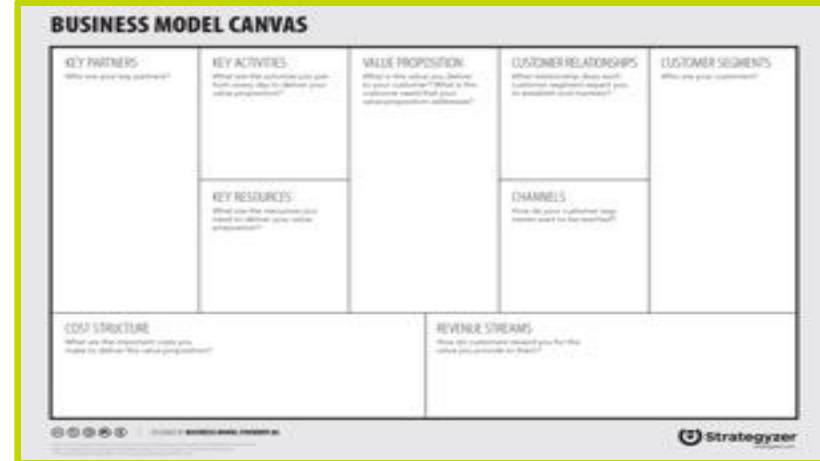
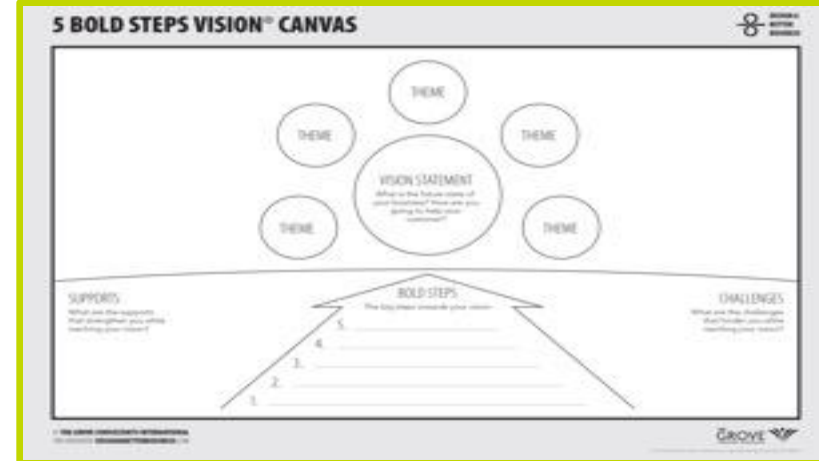
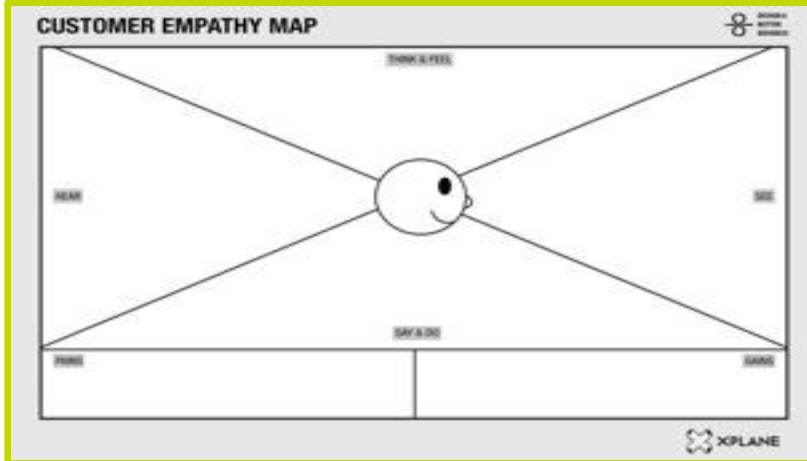
Invite Key People

To join the design session - you want to start building a deeper understanding and a sense of ownership immediately





2.) Create a Strong Foundation



We use Visual Tools to help simplify complexity



It Can Also Be Done Remotely

The screenshot displays the 'Do Tank Strategy Template' interface, designed for remote workshops. The top navigation bar includes a title dropdown, navigation icons, a 'Facilitator' role indicator, and a 'Share' button. A secondary bar shows 'Highlight votes' with color-coded filters for Session 1, Best Idea, Values, Top Pains, and Obstacles.

The main workspace features a large, colorful illustration of a landscape with a sun-like structure in the center, divided into segments for different workshop stages. To the left, a sidebar contains an 'Agenda' and 'General Rules & Roles' section. The agenda lists the following schedule:

- 11:30 Introduction & Warmup
- 11:40 Vision
- 12:00 Objectives; Results & Metrics
- 12:40 Obstacles
- 12:50 Critical Next Steps
- 1:00 End

The 'General Rules & Roles' section includes guidelines such as starting and finishing on time, muting microphones, and being respectful. The central illustration includes labels for 'Access Keywords', 'Key Topic Themes', '2. Vision', 'ANCILLARY ACCESS', '3. Objectives, Results & Metrics', '4. Obstacles', '5. Critical Next Steps', '1. Warmup', and 'Post-workshop Ideas'. A 'Zoom Settings' panel is visible in the bottom right corner.

Who You Are (Current State)

What's Around You (Context)

Where You Are Going (Vision)

SAILBOAT CANVAS

With an entity/purpose/objective in mind, the sailboat canvas allows you to align around your current state reality.
For more tools visit academy.dotankdo.com/tools

Team Name

Date

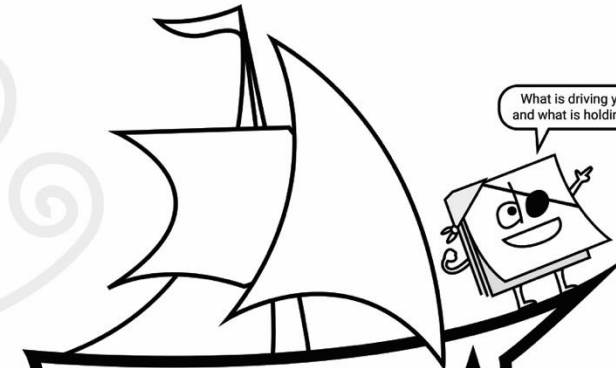
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Business design, redesigned.

Enablers

What is helping to push you forward? What are the positive forces that you would want to amplify and leverage in your strategy?

Blockers

What is holding you back? What are the obstacles that stand in your way? What must you navigate and overcome going forward?



What is driving you forward and what is holding you back?

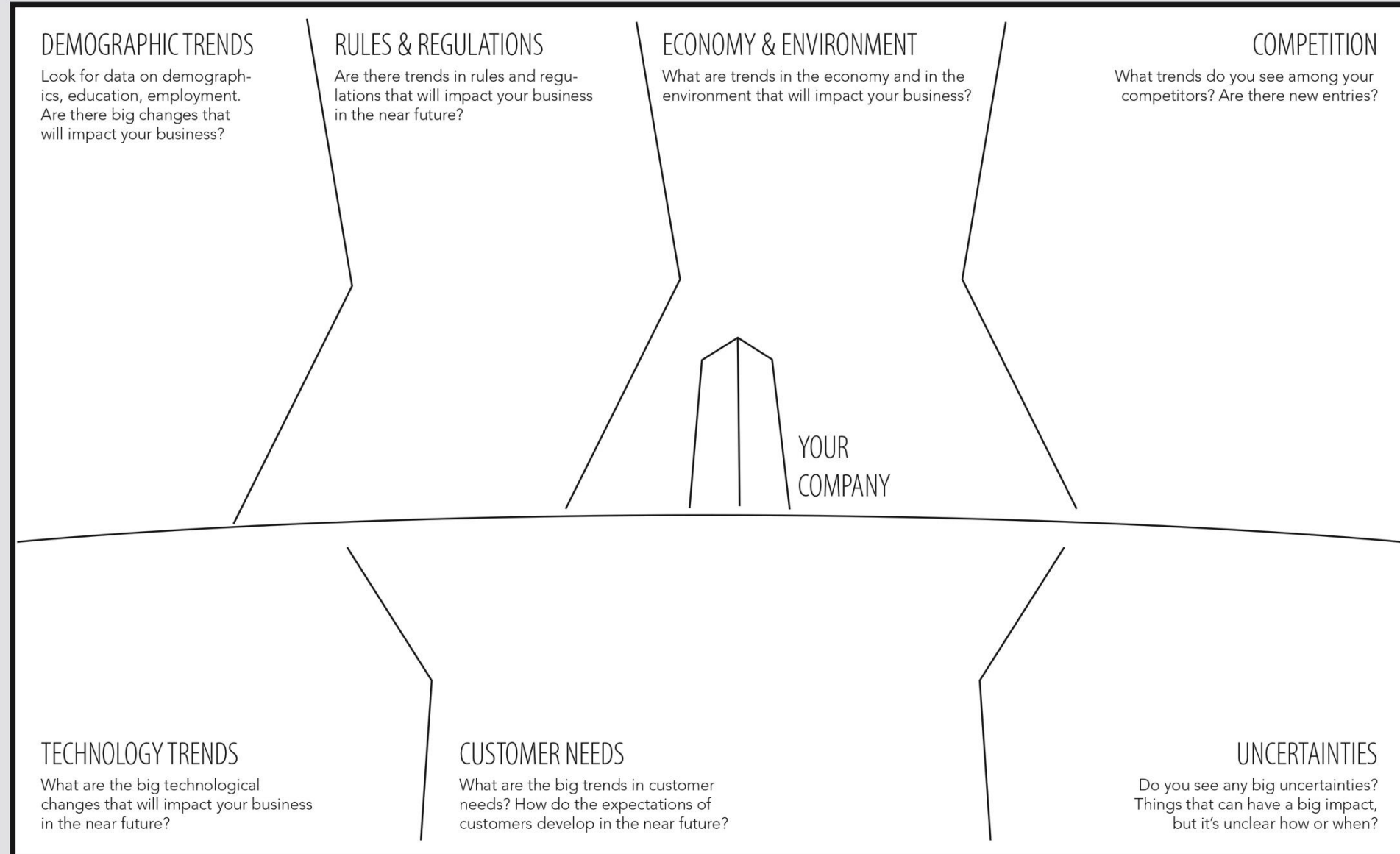


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CONTEXT MAP® CANVAS



5 BOLD STEPS VISION® CANVAS

The diagram is a template for a vision canvas. It is divided into two main horizontal sections by a curved line. The top section contains a central circle labeled 'VISION STATEMENT' with the text 'What is the future state of your business? How are you going to help your customer?'. Surrounding this central circle are five smaller circles, each labeled 'THEME'. The bottom section is divided into three parts. On the left is a box labeled 'SUPPORTS' with the text 'What are the supports that strengthen you while reaching your vision?'. On the right is a box labeled 'CHALLENGES' with the text 'What are the challenges that hinder you while reaching your vision?'. In the center of the bottom section is a large upward-pointing arrow labeled 'BOLD STEPS' with the text 'The big steps towards your vision'. Inside the arrow, there are five horizontal lines numbered 1 through 5 from bottom to top, representing the steps.

THEME

THEME

THEME

THEME

THEME

VISION STATEMENT
What is the future state of your business? How are you going to help your customer?

SUPPORTS
What are the supports that strengthen you while reaching your vision?

CHALLENGES
What are the challenges that hinder you while reaching your vision?

BOLD STEPS
The big steps towards your vision

5. _____

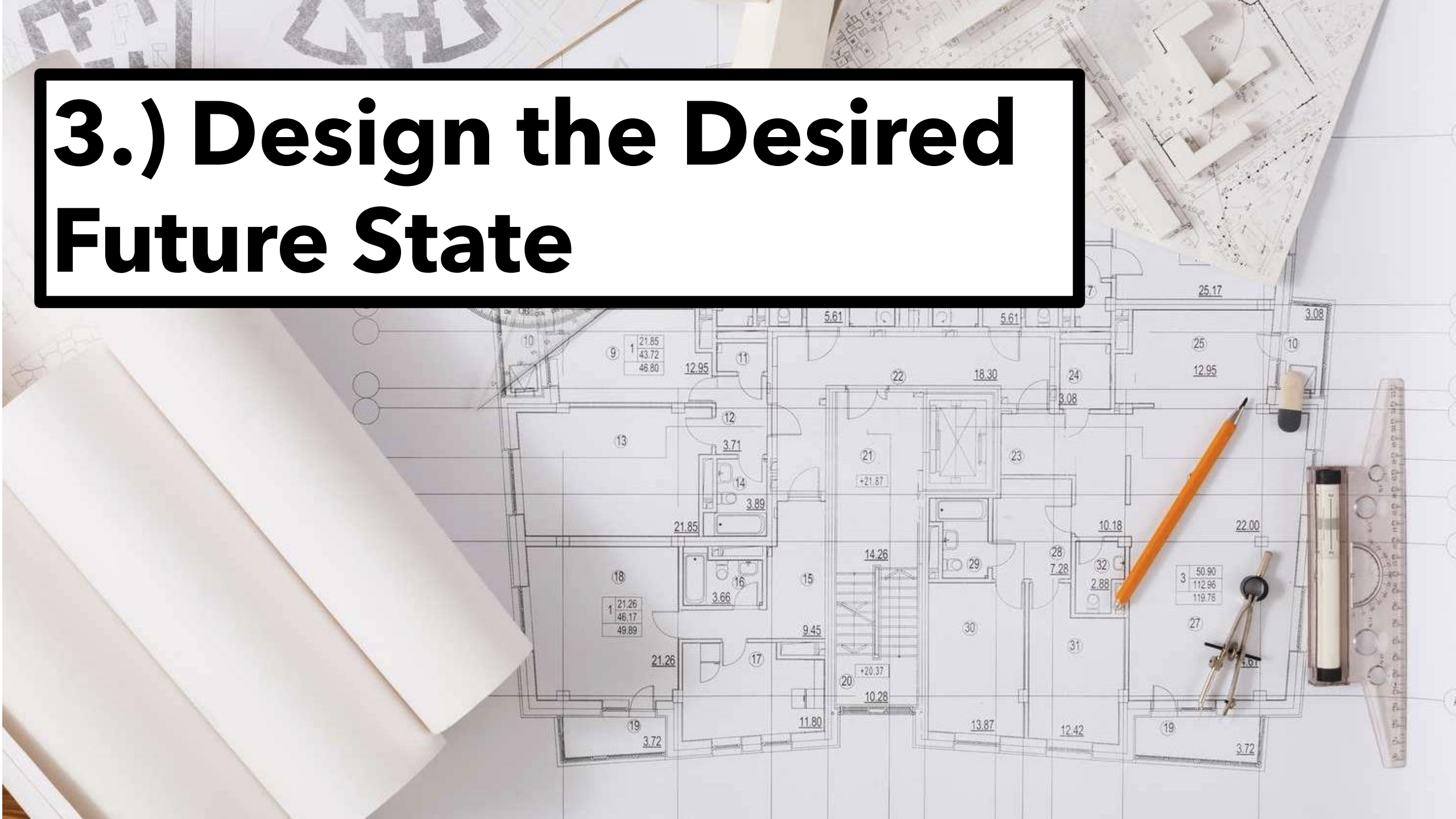
4. _____

3. _____

2. _____

1. _____

3.) Design the Desired Future State



BUSINESS MODEL CANVAS

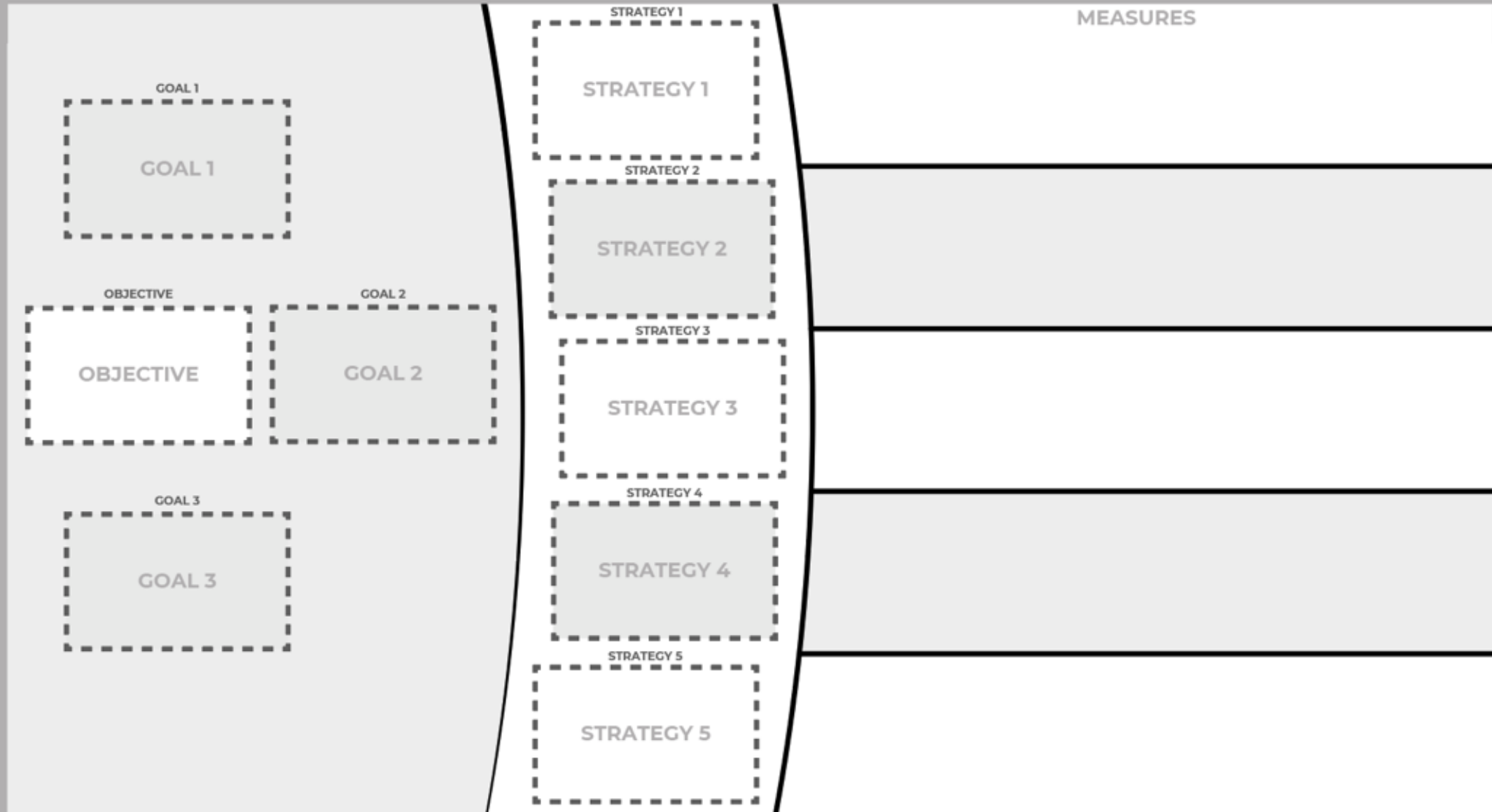
KEY PARTNERS Who are your key partners?	KEY ACTIVITIES What are the activities you perform every day to deliver your value proposition?	VALUE PROPOSITION What is the value you deliver to your customer? What is the customer need that your value proposition addresses?	CUSTOMER RELATIONSHIPS What relationship does each customer segment expect you to establish and maintain?	CUSTOMER SEGMENTS Who are your customers?
	KEY RESOURCES What are the resources you need to deliver your value proposition?		CHANNELS How do your customer segments want to be reached?	
COST STRUCTURE What are the important costs you make to deliver the value proposition?			REVENUE STREAMS How do customers reward you for the value you provide to them?	



DESIGNED BY **BUSINESS MODEL FOUNDRY AG**

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OGSM Canvas



Metrics and Accountabilities

are critical if you want to effectively move from
'thinking' to 'doing'



STRATEGIC GAMEPLAN

Team Name

Date

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Business design, redesigned.

ACTIVITIES

METRICS

OBJECTIVES

CHALLENGES

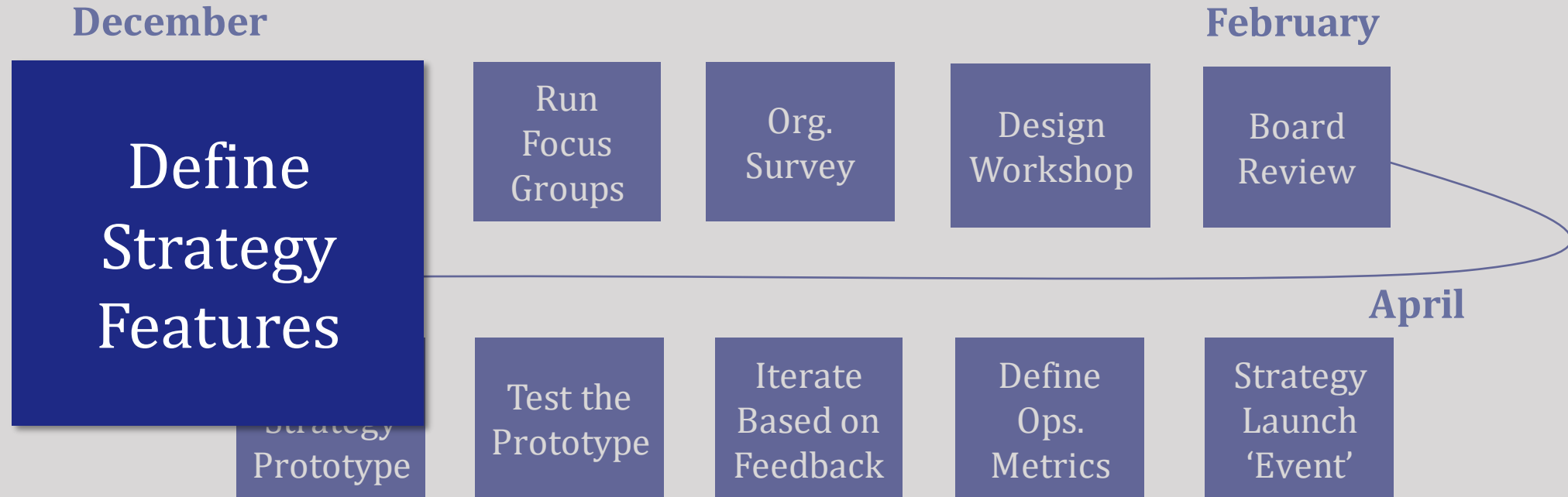


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The Strategy Design Journey




You May Use Precision Tools

Internal Dynamics



 **dotank** + 





 Governance	 Team Skills	 Maintenance of Technology
<u>Governance Structures (How)</u>	<u>Skills We Have</u>	<u>Monitoring System Performance</u>
	<u>Skills We Need</u>	<u>Ensuring Regular Updates and Upgrades</u>
<u>Governance Roles and Responsibilities (Who)</u>	<u>How We Will Acquire Needed Skills</u>	<u>Long-term Sustainability</u>


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Canvas 3 of 6 from the Implementing AI series
To explore all the strategic tools, please visit:
[www.https://www.aipriori.com/resources](https://www.aipriori.com/resources)

AI Strategy Summary

 **dotank** + 




 Ethics Policy	 Alignment with Org. Goals	 Stakeholder Engagement												
	<div><div>What are we trying to accomplish?</div><table><tr><td>Population</td><td>Goal</td><td>Time Expectation</td><td>Location</td></tr></table></div> <div><div>How will we measure this?</div><table><tr><td>Outcome</td><td>Process</td><td>Tracking Tool</td></tr></table></div> <div><div>How will we govern and oversee this?</div><table><tr><td>Idea 1</td><td>Idea 2</td><td>Idea 3</td><td>Idea 4</td><td>Idea 5</td></tr></table></div> <div>Aim Statement</div>	Population	Goal	Time Expectation	Location	Outcome	Process	Tracking Tool	Idea 1	Idea 2	Idea 3	Idea 4	Idea 5	<div>Data Management</div>
Population	Goal	Time Expectation	Location											
Outcome	Process	Tracking Tool												
Idea 1	Idea 2	Idea 3	Idea 4	Idea 5										
 Tech Infrastructure														

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Canvas 4 of 6 from the Implementing AI series
To explore all the strategic tools, please visit:
[www.https://www.aipriori.com/resources](https://www.aipriori.com/resources)

And Have Custom Elements

Different Types of Output



THA DEI Project Charter

This project charter clarifies expectations among the team and establishes the project's aim, measures, change ideas, scope, and team members.

Focus Area _____

What are we trying to accomplish?

Aim Statement:

How are we going to measure this?

Outcome Measures	Current	Target
_____	_____	_____

Process Measures	Current	Target
_____	_____	_____

What are we going to do differently?

Action Steps	Score / 20
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Supports	Barriers
_____	_____

Scope

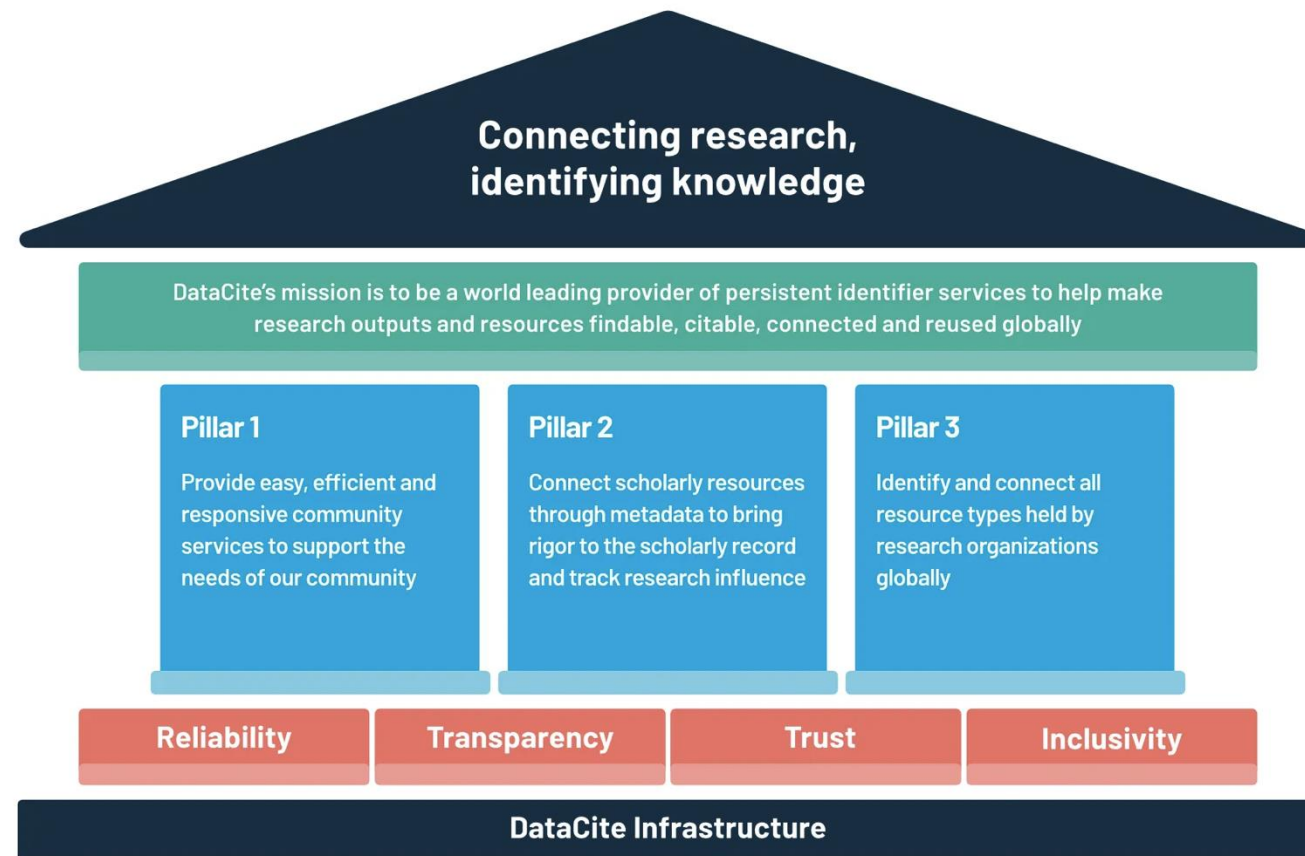
In-Scope	Out of Scope
_____	_____

Who is on your team?

Executive Sponsors

Team Members

Ad-Hoc Stakeholders



4.) Test and Iterate



Segment Your Audience:

You can test your strategy at scale via a survey, and get more nuanced feedback and engagement via interviews



The Counterintuitive Choice...

Invite your critics and skeptics to arrive at the party early



Think about the last big change that was implemented at your org. Do you feel that people understood the nuances and rationale behind the change?

- **Nearly everyone did**
- **Mostly yes**
- **Yes and no – it was split**
- **Mostly no**
- **Nearly everyone did not**

ALIGN

**Using Storytelling to Build
Understanding and
Ownership**

"The mistake people make is thinking the story is just about marketing. No, the strategy is the story. If you make your story better, you make your strategy better."

— Ben Horowitz





**Simplify complex
conversations**



**Convince people of a
point of view**



Build trust

**The whole point is to
influence change**

**Secure resources
and buy-in**



**Educate people on how
to use technology**

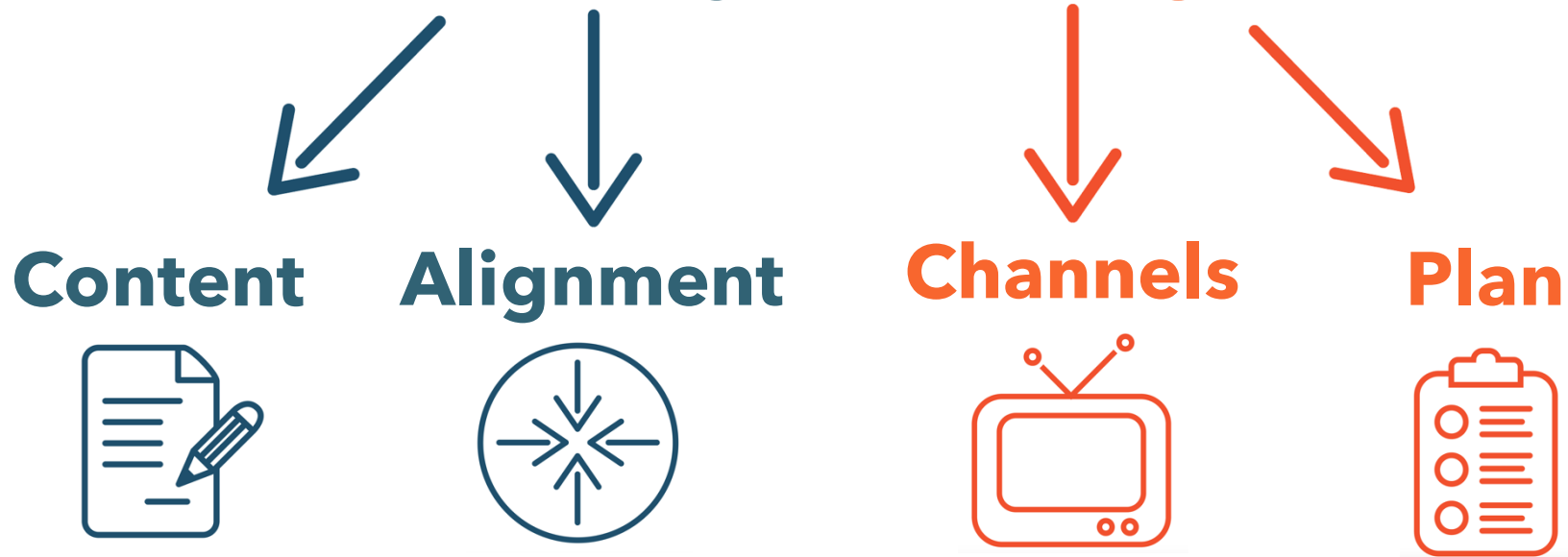


**Align people
and teams**





Story + Telling



"Storytelling" helps you refine your strategic plan and fortify your team culture. It accelerates your work and helps you reach your goals.



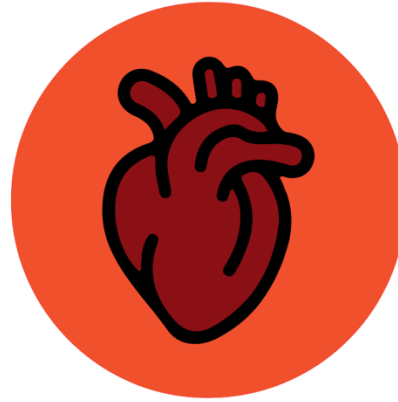
The Story

All our stories – visual or verbal – must be tuned to:

Head



Heart



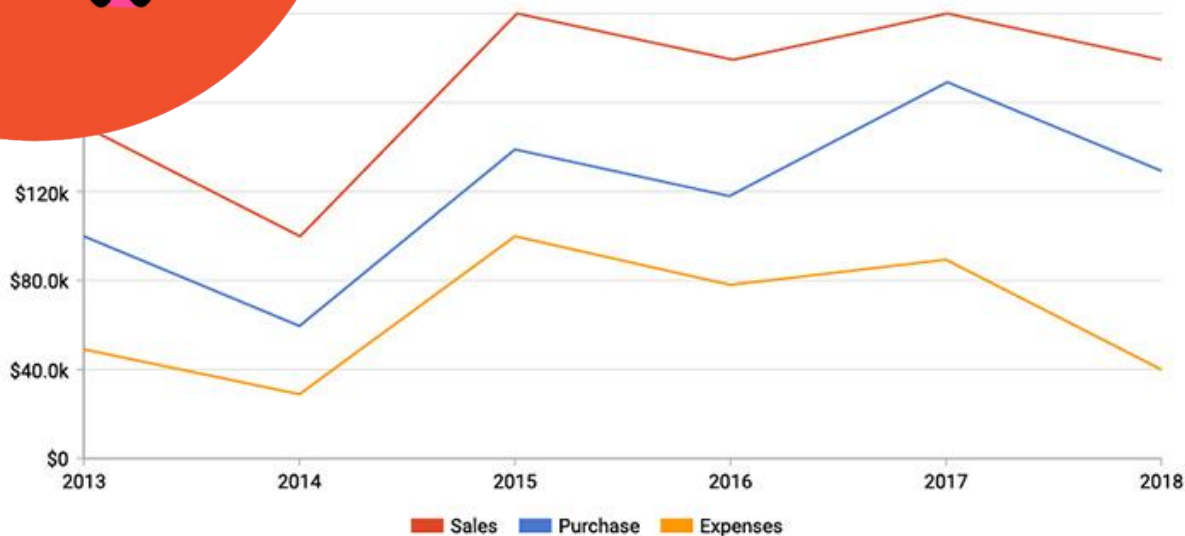
Eyes



STRATEGY!

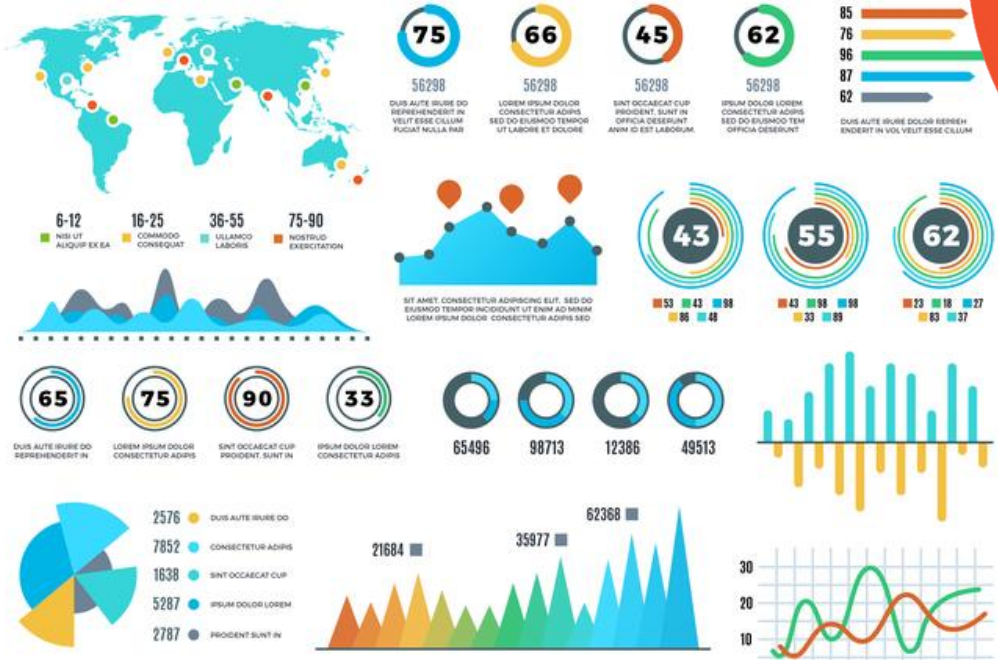


Company Performance



$$\begin{aligned}
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 &\int \frac{x}{\sqrt{1-x^3}} \quad x + \cos \quad axbxc = (axb)xc \quad \int \frac{x}{\sqrt{1-x^3}} \quad x + \cos \quad axbxc = (axb)x \\
 &\log[1-x] \left(\frac{1-x^{1/2}}{1+x^{1/2}}\right)^2 (x + \sin(\frac{\pi}{14})) \quad \log[1-x] \left(\frac{1-x^{1/2}}{1+x^{1/2}}\right)^2 (x + \sin(\frac{\pi}{14})) \\
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 &3 > -4 \left\{ \frac{xx+yy}{xy} \sin\left[\frac{\pi}{14}\right] \div \sqrt{2} \right\} \quad 3 > -4 \left\{ \frac{xx+yy}{xy} \sin\left[\frac{\pi}{14}\right] \div \sqrt{2} \right\} \\
 &\infty * \left\{ \frac{xy}{xy} \sin\left[\frac{\pi}{14}\right] \div \sqrt{2} \right\} \quad \infty * \left\{ \frac{xy}{xy} \sin\left[\frac{\pi}{14}\right] \div \sqrt{2} \right\} \\
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 &\int \frac{x}{\sqrt{1-x^3}} \quad x + \cos \quad axbxc = (axb)xc \quad \int \frac{x}{\sqrt{1-x^3}} \quad x + \cos \quad axbxc = \\
 &\log[1-x] \left(\frac{1-x^{1/2}}{1+x^{1/2}}\right)^2 (x + \sin(\frac{\pi}{14})) \quad \log[1-x] \left(\frac{1-x^{1/2}}{1+x^{1/2}}\right)^2 (x + \sin(\frac{\pi}{14})) \\
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 &3 > -4 \left\{ \frac{xx+yy}{xy} \sin\left[\frac{\pi}{14}\right] \div \sqrt{2} \right\} \quad 3 > -4 \left\{ \frac{xx+yy}{xy} \sin\left[\frac{\pi}{14}\right] \div \sqrt{2} \right\} \\
 &\infty * \left\{ \frac{xy}{xy} \sin\left[\frac{\pi}{14}\right] \div \sqrt{2} \right\} \quad \infty * \left\{ \frac{xy}{xy} \sin\left[\frac{\pi}{14}\right] \div \sqrt{2} \right\} \\
 &\sqrt{\frac{1}{3}} ab \quad SH \supset P \quad MS^{(1)} \quad \sqrt{\frac{1}{3}} ab \quad SH \supset P \quad MS^{(1)}
 \end{aligned}$$







The Telling

Be intentional in your plan

WHO IS THE AUDIENCE?

WHAT IS IN IT FOR THEM?

WHAT DO WE WANT THEM TO DO?

IN SERVICE OF WHAT?



Telling the strategy story

often requires a nuanced plan
that reaches different audiences
in different ways





**Simplify complex
conversations**



**Convince people of a
point of view**



Build trust

**The whole point is to
influence change**

**Secure resources
and buy-in**



**Educate people on how
to use technology**



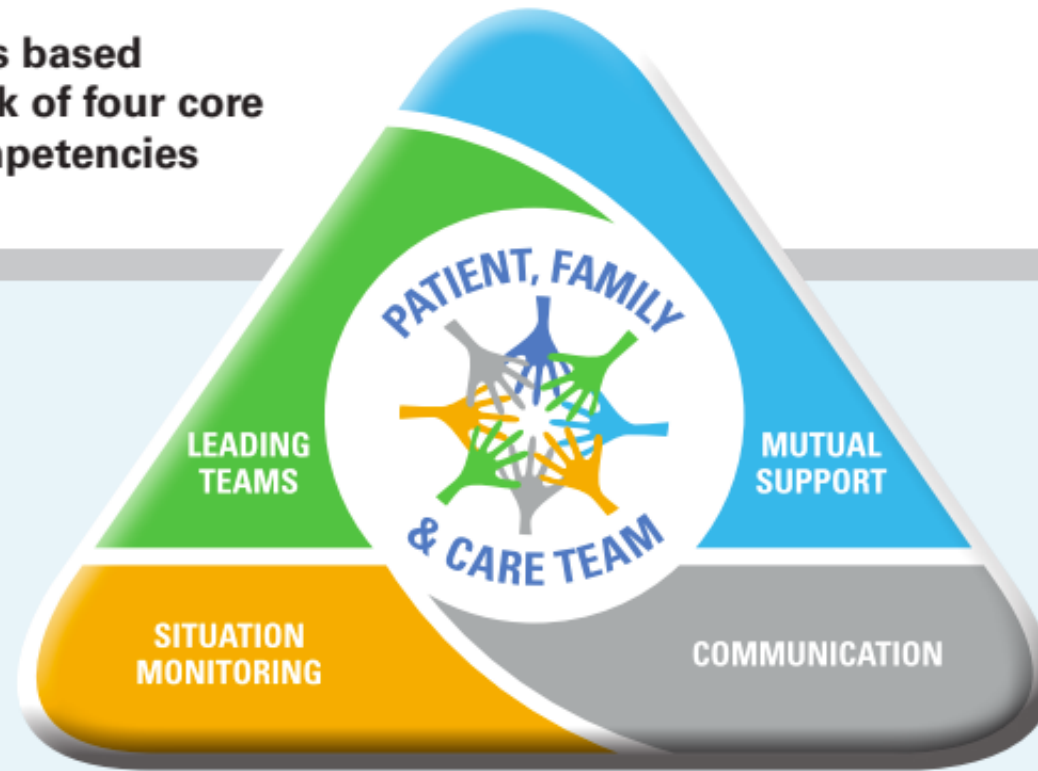
**Align people
and teams**



DO!

Moving Teams to Action

- **TeamSTEPPS is based on a framework of four core teamwork competencies**



1

COMMUNICATION:

Effectively exchange information among team members, regardless of how it is communicated.

2

LEADING TEAMS:

Direct and coordinate, assign tasks, motivate team members and facilitate optimal performance.

3

SITUATION MONITORING:

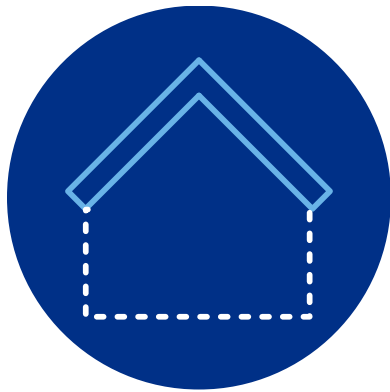
Develop common understandings of the team environment; apply strategies to monitor team members' performance; maintain a shared mental model.

4

MUTUAL SUPPORT:

Anticipate other team members' needs through accurate knowledge; shift workload to achieve balance during periods of high workload or stress.

Change Management



STRUCTURAL



EMOTIONAL



RATIONAL

The Principles of Change

Motivating Change

- Creating readiness for change
- Overcoming resistance

Creating a Vision

- Energizing commitment
- Defining a “future state”

Developing Support

- Identifying key stakeholders and champions
- Providing opportunities for ownership

Sustaining Momentum

- Providing resources
- Continuous development/evolution
- Reinforcing new behaviors & celebrating wins

Managing the Transition

- Activity planning
- Addressing barriers
- Continue to build/develop champions

Shared Values

are often created and discarded or
they quietly sit on a wall...
invoke them frequently.



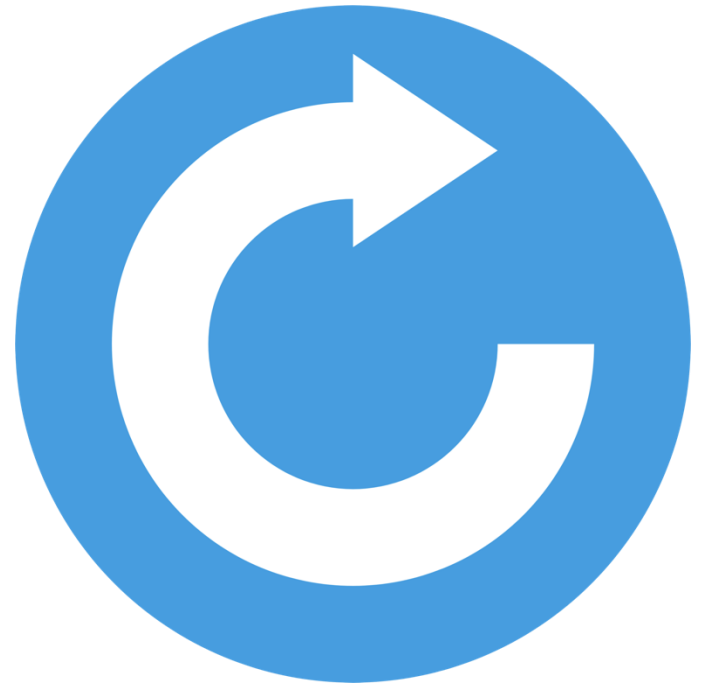
Invoke Org. Strategy:

tying your initiative to larger initiatives that leadership has put on the record increases the likelihood of support and resources.



Revisit Your Strategy:

reference it often with your team and keep it refreshed. Repetition is key to retention;
Repetition is key to commitment.



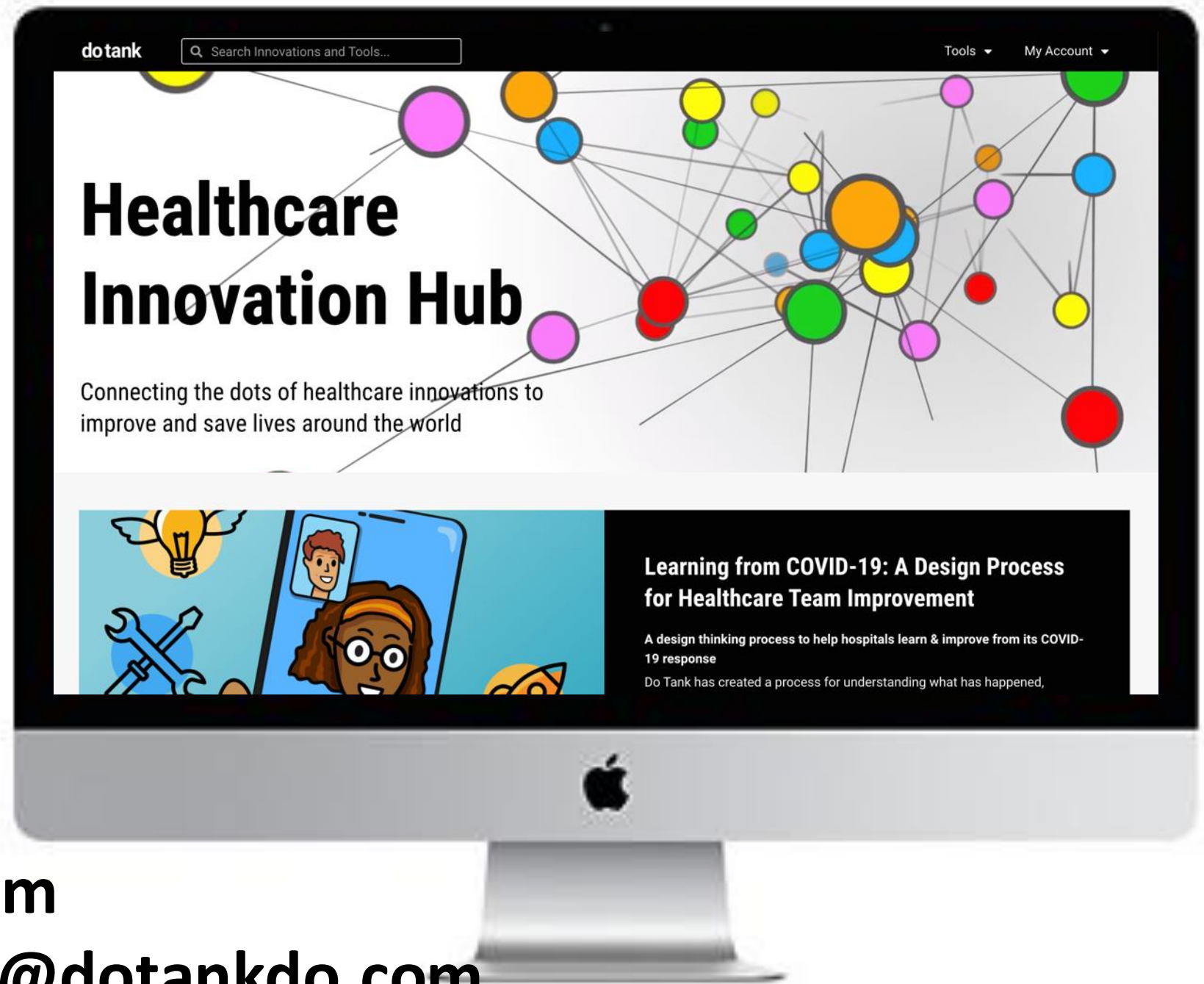
**Share with your colleagues...in the chat,
please share the number one piece of
advice you would give to ensure that
'things get done' effectively and on time.**

Questions and

Discussion

do tank

Business design, redesigned.



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do tank

Business design, redesigned.



Matthew Kelly

matt.kelly@dotankdo.com



Adam Kohlrus

adam.kohlrus@dotankdo.com

Final Reminders

- **Evaluation**

- Please complete the evaluation form that appears on your screen once the webinar ends

- **Continuing Education**

- Create a Duke OneLink account if you have not done so
 - Instructions can be downloaded from the chat or from the email you received this morning with the slide deck
- Text **TUXFET** to (919) 213-8033 within 24 hours



Questions? Stay in Touch!

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