Using Change Management and Lean Principles for Better Outcomes
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Integrating Multiple Disciplines

Continuous Improvement

- Define
- Plan
- Measure
- Act
- Check
- Improve
- Knowledge
- Ability

Reinforcement

Awareness

Desire

Analyze

Do
SUCCESSFUL CHANGE

TECHNICAL SIDE

Define
- Define the problem with the process

Measure
- Measure the process to identify current state

Analyze
- Analyze and determine the root causes of the defects

Improve
- Improve the process by eliminating the defects

Control
- Control the improved process to avoid backsliding

Initiate
- Define the project

Plan
- Coordinate project logistics

Execute
- Do the work to improve the process

Monitor & Control
- PDCA

SUCCESSFUL CHANGE

Awareness
- Understand the need for and the nature of the change

Desire
- Support and participate in the change

Knowledge
- Implement new skills and behaviors

Ability
- Implement and demonstrate change

Reinforcement
- Build a culture and competence around the change

PEOPLE SIDE

Embrace
- Implement and demonstrate change

Adopt
- Implement new skills and behaviors

Use
- Build a culture and competence around the change

Prosci
DEFINE Integration

**TOOLS**
- Use the Voice of the Customer and Gemba walk to create a well-defined problem

**LOGISTICS**
- Identify project sponsor, members and stakeholders

**PEOPLE**
- Start communicating to your stakeholders about the existence of the problem

**DEFINE**
- Define the problem
  - Problem statement
  - Process map

**INITIATE**
- Define the project
  - Charter
  - Stakeholders

**AWARENESS**
- Communicate a problem exists
  - What is the change and why is it happening

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MEASURE Integration

**TOOLS**
Collect and visualize your data using charts and tables to better define the problem.

**LOGISTICS**
Plan your project schedule and identify resources needed.

**PEOPLE**
Use the data to start communicating the risks/benefits to your stakeholders.

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**MEASURE**
- Measure the problem
- Data Collection Plan

**PLAN**
- Coordinate project logistics
- Project schedule and resources

**DESIRE**
- Support/participate in the change
- What are the risks/benefits surrounding the change?
**Scenario:**

Recent audit findings of a newly implemented policy showed one of our offices was at an average of 65% accuracy for following the new process required by the policy.
What’s the change you are trying to implement?

Problem
What is the problem with the current process? Use data/metrics to support the problem.
Recent audit findings of a newly implemented policy showed an average of 65% accuracy for following the new process required by the policy.

Measurements
How will we measure success and show progress towards our goal?

Goal
What is the ideal future state?

Importance
Why is this change important? What’s in it for staff?

Who & What is affected?
What people, departments, and processes need to change in order to realize our goal?

How will we support our people?
What actions will we take to support our people through this change? How will we guide the sponsor to build a coalition and maintain their engagement?

Required refresher training

Timeline
Planned change activities based on status of project

Awareness
Desire
Knowledge
Ability
Reinforcement
**Scenario:**

Recent audit findings of a newly implemented policy showed one of our offices was at an average of 65% accuracy for following the new process required by the policy.
<table>
<thead>
<tr>
<th>Stage of Change</th>
<th>Purpose</th>
<th>Method</th>
<th>Audience</th>
<th>Message</th>
<th>Delivery Date</th>
<th>Sender</th>
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</thead>
<tbody>
<tr>
<td>Awareness</td>
<td>What is the nature of the change? Why is the change happening? What is the risk of not changing</td>
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<tr>
<td>Desire</td>
<td>What's in it for me (WIIFM)?</td>
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<tr>
<td>Knowledge</td>
<td>What do I need to do?</td>
<td></td>
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<tr>
<td>Ability</td>
<td>How do I need to do it?</td>
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<tr>
<td>Reinforcement</td>
<td>What is the plan for keeping the change in place?</td>
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</tbody>
</table>
ANALYZE Integration

**ANALYZE**
- Analyze the problem
- Root cause analysis

**EXECUTE**
- Do the work to improve the process
- Direct and manage project work

**DESIRE**
- Support/participate in the change
- What are the risks/benefits surrounding the change?

**TOOLS**
Use tools like the Fishbone Diagram and 5 Whys to determine the root cause of the problem

**LOGISTICS**
Identify and assign tasks to keep the project on track

**PEOPLE**
Use the outcome of your root cause analysis to communicate the risks/benefits of changing to your stakeholders (WIIFM)

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IMPROVE Integration

**TOOLS**
Use Mind Mapping and the PICK chart to brainstorm and prioritize countermeasures

**LOGISTICS**
Identify and assign tasks to keep the project on track

**PEOPLE**
Provide communication, training and subject matter experts to demonstrate what needs to be done and how to do it

**IMPROVE**
- Improve the process
- Develop countermeasures to the root cause

**EXECUTE**
- Do the work to improve the process
- Direct and manage project work

**KNOWLEDGE & ABILITY**
- Implement and demonstrate new skills and behaviors
- What do I need to do and how do I need to do it?
CONTROL Integration

**TOOLS**
Use the RACI Chart or Implementation plan to monitor or make adjustments as needed to standardize the new process.

**LOGISTICS**
Monitor and measure progress towards deliverables.

**PEOPLE**
Celebrate successes, reward successful change and have a system in place to prevent backsliding.

**CONTROL**
Control the process

**MONITOR & CONTROL**
Monitor improvements and make adjustments as needed

**PDCA**
Monitor and measure progress towards deliverables

**REINFORCEMENT**
Build a culture and competence around the change

What is the plan for keeping the change in place?

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Thank You!

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