

Tools and Tips to Lead (And Teach) Process Improvement Online

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Agenda

- ▶ Online polling, instant and interactive
- ▶ Virtual whiteboard, it feels like home
- ▶ Getting the most out of your online meeting platform
- ▶ Follow-up is key
- ▶ Lessons learned the hard way
- ▶ Questions and answers
- ▶ Resources

Online Polling Instant and Interactive



Online polling for engagement

- ▶ A tool to play team building games, icebreakers, and to gain consensus amongst workgroups
- ▶ Anonymous submissions allow attendees to give honest feedback
- ▶ A great way to do introductions quickly with large groups
- ▶ These tools are available for free with permission from your agency or organization
- ▶ We are going to use an online polling application to get you involved right now

Introductions & Survey

Menti.com
code **9798 5459**

or click on link in the chat



It feels like home!

How to use virtual whiteboarding tools to engage your groups

Why would you use a whiteboarding tool?

- ▶ Great way to gain active participation
- ▶ Gives everyone on the project the chance to participate
- ▶ Excellent way to organize your process improvements in one spot that can be accessed by everyone on the team
- ▶ This can also be an anonymous way for people to participate

Example one: Problem solving

- ▶ Problem solving with our Employer of Choice Workgroup
- ▶ This workgroup reviews the results from the Employee Engagement Survey and develops an action plan around one to two questions from the survey
- ▶ You can also use a virtual whiteboard for a more formal seven step problem solving.

Example two: Welcoming ideas for change

- ▶ We are currently working on implementing this new whiteboard where we ask for ideas on making our work better
- ▶ Gives everyone on the team the chance to participate
- ▶ Can be seen as a “safer” way to share an idea because they are somewhat anonymous

Ideas for change – Example

Suggestions for a better way of doing things in PPD
Please enter suggestions for your office below. You can also enter suggestions in the general category.

General PPD suggestions <div><div></div><div></div><div></div><div></div></div> <div><div></div><div></div><div></div><div></div></div>	CMO Suggestions <div><div></div><div></div><div></div><div></div></div> <div><div></div><div></div><div></div><div></div></div>	PMO Suggestions <div><div></div><div></div><div></div><div></div></div> <div><div></div><div></div><div></div><div></div></div>
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Example three: Huddles

- ▶ Before the pandemic, we used to huddle once a week in person – in front of a whiteboard.
- ▶ During the pandemic we tried different avenues to recreate this feel and finally landed on this whiteboard
- ▶ Allows each team to share what they are working on, what roadblocks they are facing, successes they've experienced and to share kudos about their teammates

Huddle example

Team Coordination

Ongoing Priorities

This week's priorities 10/17/2023

HCA Updates/Shared Knowledge

Consider the following questions:

Add DATES to notes if time-related

- What did you learn about a customer that should be shared?
- What lessons learned did you/we have this past week?
- What updates did we hear about we need/want to share?
- Are there agency updates that may impact our work?
- KUDOS! Add a "kudos comment" for someone!
- Connecting our work to customers and community.

Agency
Update

Kudos!

Customer
work

Example four: Plus/Delta

- ▶ We do plus/deltas after each of our Lean Six Sigma trainings
- ▶ We believe in the importance of real time feedback and being able to adjust quickly to the needs of our students
- ▶ This whiteboard plus/delta gives students an anonymous outlet to let us know how we did
- ▶ We adjust almost every single class based on this feedback

Plus/Delta Example

Training/Meeting:

Plus - what did you like?

Delta - what can we do to make it better?

Online Meetings

Getting the most out of your online meeting platform



Online meeting platform engagement!

- ▶ We have found the following tools are helpful in gaining engagement in our process improvements and our process improvement trainings:
 - ▶ Breakout rooms – putting participants into rooms gets them talking more freely than when everyone is in one big room together
 - ▶ Reactions – encourage staff to react, especially if cameras are off
 - ▶ Emojis – ask folks to drop an emoji in the chat when they come back from break
 - ▶ Music during breaks



Follow-up is key

In a virtual world, it's even more important to follow-up after a meeting

How do we follow-up?

- ▶ Action Items template – documenting next steps very clearly in a WHO will do WHAT by WHEN format
- ▶ Sending reminders and documents out after a meeting and again before the next meeting
- ▶ One-on-one check-ins with individuals if needed

Lessons learned

A few things we've learned the
hard way



A few lessons learned

- ▶ To camera or not to camera – that is the question
- ▶ Ensure you have proper staffing for your meetings/trainings
- ▶ Breaks are a must!
- ▶ Be sure to check in on your breakout rooms
- ▶ Be flexible and adjust to the needs of your participants/students
 - ▶ Adjust time and length of meetings/trainings
 - ▶ Share our learnings, share our tools, knowledge and templates!



Questions? Thoughts?

Resources

- ▶ Audience engagement, surveys, polls, quizzes: Mentimeter.com, kahoot.com, quizizz.com, surveymonkey.com, forms.office.com, etc.
- ▶ Virtual Whiteboard: Mural.co, miro.com, Webex.com, lucidspark.com, figjam.com, etc. plus apps available within Microsoft Teams & Zoom if your workspace allows.
- ▶ Action Item Excel template

Thank you!!

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