Foundation Update

Bi-Monthly June 2009

IN THIS ISSUE

Who We Are

Quality Texas focuses on an assessment and feedback process, education, training, and recognition to help businesses, schools, hospitals, non-profits, and government agencies improve performance. The Foundation administers the Texas Award for Performance Excellence program (Based on the Baldrige Criteria), the state's highest recognition for Quality.

Vision

What we're striving to do

Engage all Texas organizations in a journey toward the achievement of world-class performance excellence.

Mission

Why we exist

Quality Texas helps organizations achieve performance excellence using the Baldrige Criteria as a framework for improvement.

NOTES FROM THE CEO

Bill Denney
Quality Texas Foundation

Dear Fellow Travelers on the Road to Excellence:

WE DON'T DO THAT HERE

Recently, I heard Howard Behar speak about his years as president of Starbucks. Behar published a very inspiring book, *It's Not About the Coffee.*

Some years ago a store manager came to him with an idea for a new product. Behar thought it seemed good so he took it to the Starbucks leadership team. It was soundly rejected with a strong, **"we don't do that here!"** Behar's colleagues had a clear vision of what they thought Starbucks was and what it wasn't.

The manager pleaded with Behar, "Every day we get requests for this product that our competitors have." No, said the leadership team, again - **We don't do that here!**

Going it alone, Behar finally told her to buy what she needed and give it a try, but not to let anyone at corporate know what she was doing until they had sales to prove the value of the idea.

What was this new product the determined store manager wanted to sell? Today frappuccinos represent a 4 billion dollar a year worldwide business for Starbucks.

When you want to improve, especially in these difficult times, you will always find people saying, "we don't do that here." Don't listen. All organizations must evolve, change and grow.

Every so often, I seem to get messages in the strangest places. A few weeks ago, I opened a fortune cookie to find this.

You will be successful through innovation and determination.

I'm keeping it as a reminder. Sometimes, guidance we seek can be very clear and actionable.

DON'T MISS ARTICLES ON PAGES 12 & 13 FROM THIS YEAR'S AWARD RECIPIENT

COME TO THE CONFERENCE AND MEET THEM IN PERSON

Business Simplicity and Baldrige:
Use Both to Get Better Faster

Craig A. Anderson
President, Global Performance Systems, Inc.

The journey to performance excellence may appear daunting, but always keep one thing in mind: where you begin matters much less than how fast you improve. This message is as valid today as when Dr. W. Edwards Deming told it to a disbelieving group of Japanese industrial managers in Hakone, Japan, in 1950. The idea of a Toyota competing against GM seemed absurd on the surface, but Deming knew better. And so should you! All it takes is turning the wheel of improvement a little faster than the other guy.

We see four steps to get the wheel of improvement turning faster.

<u>Step 1: Simplify</u>
The first step to achieve more is… do less. This is a key learning from a good friend of ours, Ian Dover, who runs the Simpler Business Institute in Brisbane, Australia (http://www.simplerbusiness.com). Our work with Ian has convinced us that organizations are usually better off if they focus on doing fewer things, but doing them well. This means to stop doing things that do not add value to customers and root out unnecessary complexity wherever it is hiding in your organization. Given the difficulty of achieving and sustaining true improvement, it is doubly important for an organization starting on the journey to performance excellence to strive for simplicity.

<u>Step 2: Assess</u>
A journey implies a beginning and an end. To begin, you must know where you are. The open source Baldrige system makes it easy by providing a proven world-class assessment framework. See how you stack up and find the gaps. Do not get bogged down here; keep the 80-20 rule in mind. Use the Baldrige Criteria as a guide, not a dogma. We suggest using a confidential online survey to get a quick 80% understanding of the current state; here is a generic example: http://fs19.formsite.com/gpsinc/survey/index.html.

<u>Step 3: Target</u>
With the assessment data in hand, you are ready to start turning the wheel of improvement. Keep simplicity front and center. There is no need to reinvent the wheel here. Target your improvements on the biggest Baldrige gaps. Remember, the Baldrige system defines the leading edge of VALIDATED management practice, so use it as a compass. We also agree with a core principle of the Simpler Business Institute: focus improvements on what matters most to your customers. Baldrige Performance Criteria Category 3, Customer Focus, is a great place to start your analysis of customer requirements.

<u>Step 4: Commit</u>
Which leads to the single most important factor in determining how rapidly the wheel of improvement will turn: commitment. This commitment must be at the individual level and embedded in the core management systems. Commitment is key because you will never "get it right" the first time. Individuals need the courage to challenge constantly their own view of how things "should work" and embrace change. Management systems must clearly highlight and measure achievement of key improvements.

Building the capacity for rapid improvement is a huge challenge for organizations. It is also a baseline requirement for performance excellence. Our experience is that organizations that maintain a ruthless focus on business simplicity and Baldrige performance excellence will build this capacity and be ready for whatever may come along.

<u>Quotes about Texas</u>

- There's no better place than Texas to start over. – John Connelly
- You may all go to hell and I will go to Texas. – Davy Crockett
- Texas is neither southern nor western. Texas is Texas - Senator William Blakley
- I thought I knew Texas pretty well, but I had no notion of its size until I campaigned it. - Ann Richards

Can You Twitter Your Way to Performance Excellence?

Dale Hershfield
Member, Panel of Judges, Wisconsin Forward Award

Twitter is the latest new thing. Like to follow John McCain or Al Gore throughout their day? Easy. Just sign up to receive their tweets. While their tweets may provide insights, or just entertainment (Ashton Kutcher and 50 Cent also tweet), does Twitter have value for business management? The idea may not be far fetched—remember that instant messaging initially met with disdain by corporate IT types but has now become nearly as mainstream in corporations as email.

Like all new technologies before them, the newest communication technologies will open new possibilities for enhancing business performance and enabling value-adding capabilities. The most compelling uses may not be the most obvious. Where will we see the biggest impact? The internet did transform the sale of music (thanks, iTunes) but it didn't wipe out the neighborhood grocery store (sorry, Webvan). Some early trends are emerging and they promise to transform today's best practice standards for knowledge management and customer interaction.

New communication tools parallel (foster?) growing social and cultural changes (in most parts of the world) toward greater transparency and democratization. These changes are also playing out within individual businesses and non-profit organizations.

The pace of change in the tools themselves is probably a good indicator of the pace of change we can expect in business practice. In the early days, on-line communication meant email and those early email applications were trapped in the confines of proprietary systems that didn't talk to one another. There was a time when ftp (file transfer protocol) and chat rooms were novel, and for those who had the requisite technical skills, useful tools. The world wide web arrived and early web pages were filled with generally static content, which, in turn, created a need for indexing and navigation that was filled neatly by Yahoo. Many companies implemented intranets to enable convenient sharing of documents and information, using a one-to-many communications model.

AOL popularized instant messaging. Wiki's, a kind of electronic whiteboard, followed which for the first time allowed non-technical users the ability to create, edit and manage dynamic on-line content with relative ease. Wiki's are still popular today, along with blogs (on-line personal journals), forums (electronic discussion boards), and social networking sites, such as Facebook. Microsoft's SharePoint software and IBM's Lotus family of software bring all of these tools together in an integrated environment designed specifically for business settings. And now enter Twitter.

How fast is technology moving? Broad public use of the internet began in the 1980's and accelerated during the 1990's. According to Internet World Statistics, there are approximately 1.6 billion internet users today, nearly 24% of the world's population. Facebook was founded in February 2004 and today welcomes 200 million active users, about half of whom log on at least once a day (according to recent statistics provided by the company). Two thirds of Facebook users are outside of college and 70% are outside the United States. Twitter was founded in March 2006. While Twitter doesn't publish usage numbers, Forrester Research estimated the number of Twitter users at nearly 5 million in March 2009.

Companies are applying these tools, including Twitter, to improve staff effectiveness, reach customers in meaningful ways and engage business partners who are outside their formal organizations. To get a sense of the changes they are bringing, it is insightful to look at currently recognized best practices. A review of the application summaries of the 2007 and 2008 Baldrige recipients suggests that validated best practices that employ the newest enabling technologies have yet to take hold. While the Baldrige application allows only 50 pages, and we don't expect every Baldrige organization to be a world class leader on every dimension of the Criteria, there is very limited mention of the latest technology tools being applied to boost, say, team collaboration or knowledge management.

Focusing just on knowledge management, which will be such a natural beneficiary of these tools, the current state of the art according to recent Baldrige recipients does not appear to have grown much beyond the static intranet environment that has now grown so familiar as a one-to-many communication medium. The power of the new tools lies in their ability to enable many-to-many collaboration which, in turn, heightens innovation, increases speed and enhances alignment.

Baldrige recipients typically have well defined, systematic processes to identify, catalogue, share and implement best practices. The most prevalent approaches emphasize in-person meetings, conferences, training classes, and centers of excellence, all of which support few-to-few collaboration. Typically Baldrige organizations maintain repositories of practices, procedures and lessons learned on shared network drives, portals, or Microsoft Outlook public folders. These configurations emphasize one-to-many sharing. The dominant paradigm: providing access to previously generated knowledge for use in solving current problems. While this is decidedly valuable, it is unlikely to remain sufficient as a performance enhancing knowledge management approach.

The secret to extracting value from the new tools is to prioritize connection over content while maintaining a systematic approach, according to Hubert SaintOnge, a recognized expert in knowledge management and organizational learning. On-line tools, such as threaded conversations, blogs and forums, can facilitate connection, collaboration and engagement. For example, Iredell-Statesville Schools, a K – 12 school system in North Carolina and a 2008 Baldrige recipient, uses both face-to-face and virtual Professional Learning Communities to identify and share best practices. They cite a variety of on-line tools to support this work. The City of Coral Springs, Florida, a 2007 recipient, hosts blogs on problems and issues that enable city employees to tap into the institutional knowledge of their entire workforce. However, these citations are the exception, rather than the rule, among recent recipients.

In a recent white paper on enabling innovation in the workplace through collaboration, IBM sketches a vision of a new way of working:

> "In the old way of thinking, employees make themselves valuable through what they know. But in the new way, people make themselves valuable by seeking opportunities to work with others and tapping into the expertise that others possess. In the old way, content is owned and protected. In the new way, content is developed through participation; it is fluid, contextual and leveraged to create opportunities through ongoing collaboration. In the old way, directories of people provide static contact information. In the new way, dynamic profiles reflect what people do, with whom and how well they do it."

Some pundits believe that Twitter will become the next exponent of virtual collaboration, enabling real time exchange of knowledge and ideas among subject matter experts. The more common business applications of Twitter currently seem to be extensions of customer listening, learning and promotional channels. Forrester Research notes that "marketers as diverse as Dunkin' Donuts, Comcast, and Dell also use [Twitter] to connect with fans, address support questions, and sell products." JetBlue Airlines, as has been widely reported, routinely tracks Twitter traffic and responds to customer complaints and frustrations promptly. In the meantime, in many businesses, tools such as SharePoint and Lotus are helping teams collaborate to find better, cheaper and faster ways to accomplish their work.

Finding these new ways of working implies the need for new skills and can also create challenges to ingrained organizational culture. To achieve its cutting edge use of Twitter, JetBlue employs internal social media evangelists and technologists. Of course, the use of any new tools brings the need for training of users and IT staff. Yet the larger implementation challenge often relates to changing work habits, such as the entrenched use of email for communication with colleagues. Building an environment that captures the benefits of the "new way", where people openly share and participate rather than "own and protect", requires a culture that values openness and promotes trust.

The current wave of on-line tools readily enables virtual collaboration, breaks the constraints of geography and promotes asynchronous communication to help overcome time zone boundaries. Individuals with shared interests and common goals can work together, build knowledge, solve problems and conduct many types of business quickly and cost effectively. The power of the medium is its interactivity. The potential to create leading practices is in its infancy. Whether Twitter flourishes or fades, the direction is clear: greater immediacy and intimacy with electronic communication.

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Working Smarter

Brian S. Lassiter
President, Minnesota Council for Quality

Legend has it that during World War II, Navy fighter planes had a watch embedded in the steering column – not to help the pilot keep time, but to help save his life. You see: the first step in a pilot's emergency response process was to wind the watch. It may sound crazy, but Navy psychologists had proven that the split second required for a pilot to wind the watch was enough time for him to clear his head of distractions and to focus instead on the emergency at hand. The one second spent winding the watch bought him considerable time, enabling him to react in a more logical, coherent way. In today's business world, we are all so busy, so stretched, so overcommitted, and so inundated with information, that we sometimes forget to wind the watch – to focus on what's important and create space to accomplish our ultimate objectives...

People are busy. Very busy. And very stressed. If you are out of a job, you're probably spending most minutes of your days trying to find one. And if you're fortunate enough to have a job, you're probably spending most minutes of your days trying to keep it – working like mad to do your own work, and possibly the work of others who have departed. Long term, this stress may really have a negative impact on health and well-being. But in the short-term, I think individuals can follow some simple tips to reduce workload, refocus on priorities, and improve their professional productivity – allowing them to accomplish more in a shorter amount of time (and hopefully with reduced anxiety).

Last month, the Minnesota Council for Quality hosted a half-day workshop facilitated by Dr. Art Hill, a professor at the Carlson School of Management at the University of Minnesota. The workshop, "Lean Principles for Getting Good Things Done" outlined several tips for improving personal productivity – at work or at home. Dr. Hill had many excellent insights, but I'll offer only a few:

Keep Focused. Dr. Hill cited research that there is, on average, about 2.5 minutes between distractions for managers in the workplace. Yikes – 2.5 minutes?! In an average 9-hour day, that's 216 interruptions a day (actually, come to think of it: that sounds about right for many of my days!). Think about it: the phone rings, you get an email, someone stops by your office/cube, your mind wanders to another task, etc., etc. And to compound the problem, other research claims that professionals' recovery time from distractions at work to be about 10 minutes per interruption – time to re-gather your thoughts, dig back into your task, and so forth. So basically, we spend most of every day being interrupted and recovering from those interruptions. That can't be very efficient.

Like the "wind the watch" story above, we should all practice staying focused. Try tuning out your distractions by turning off your phone while you're focused on a major task, shutting your door, turning off your email. Find a quiet place to work. Remove clutter from your desk to reduce distractions and temptations. And practice something Dr. Hill calls "capturing your tasks." Basically, if something pops into your mind – someone you forgot to call, something you need to do later, etc. – take two seconds to write that down, but resist the temptation to do it then.

Set Priorities. Similar to staying focused, Dr. Hill says that we all suffer from "polluted priorities" – doing things that we should not be doing, procrastinating (by delaying important but difficult tasks in favor of easier tasks), or doing what he calls "chasing rabbits" (think of a puppy walking down the street...he sees a rabbit, he chases the rabbit – setting a new priority and completely forgetting about the original task at hand). I think we're all somewhat victims of chasing rabbits. Charles Hummel's 1967 paper called this behavior the "tyranny of the urgent" rather than staying focused on the important.

Dr. Hill suggests that we should all keep one consolidated calendar and one consolidated task list. He's also developed what I think is a very effective triage process for handling one of our most time-consuming (and oftentimes low value-added) activities: email. This process helps us think through how to quickly and efficiently handle the growing volume of emails we all receive (by deleting, delegating, filing, suspending, processing, or taking other action).

Set Boundaries. Do you mow your neighbor's lawn? Probably not (unless you have some sort of arrangement, I guess). But we all spend time every day doing the work that others should probably do. Dr. Hill says that this problem is because we don't often enough set – and maintain – boundaries at work (or home). As a result, roles sometimes become unclear, leading to redundant work and/or misplaced work.

Dr. Hill recommends that we use methods like project charters, role descriptions, and RACI (Responsibility, Accountability, Consulted, Informed) to set clear boundaries, allowing workers to focus on their core strengths and responsibilities. Dr. Hill says that you'll be "...doing others a favor by not doing their job." That behavior, he suggests, can lead to unproductive co-dependency at work (or at home).

Increase Capacity. Dr. Hill says that we all are suffering from "minimal margins" – a phrase first coined by Richard Swenson in his 2004 book "Margin: Restoring Emotional, Physical, Financial, and Time Reserves to Overloaded Lives." We are all overcommitted – personally and professionally – which is complicating our lives, and reducing our capacity to perform. In fact, Swenson calls it "chronic overloading" and it's impacting our ability to maintain emotional, mental, physical, and financial balance.

Think about it in a financial sense: if you have a credit card with a $10,000 limit but you're carrying $9500 in debt (a scenario that's far too common these days, I might add), you don't have much margin – much capacity – to maneuver if something happens and you need access to cash. The same scenario is true with your emotional bank account, your physical bank account, your professional bank account. You need capacity – not being completely overcommitted – to be able to respond to the needs of your changing environment.

Dr. Hill suggests that there are many ways to increase our margins – simple things like learning to say "no" to new tasks (as appropriate), using a phrase "I'll get back to you" before you commit to new assignments, and trying to accurately estimate the time tasks really take so that we don't over-commit (he suggests tasks take 2-3 times what you originally estimate, so build that in). There are also other ways to create margin – like eliminating waste and low-value added tasks, reducing the number of meetings you attend (if you can), and reducing your email and calls (using do-not call lists, opt-outs). Margin happens because we make it a priority: we should get out of the habit of trying to fill every single second of every hour of every day with scheduled activity. Then, if we encounter a new priority, we'll actually have the capacity to respond.

There's one more tip I'd like to add to the four above, and it really cuts across a few of them (and, truth be told, it's not my tip, but was written by Liz Reyer in the Minneapolis Star-Tribune about two months ago). Her advice is, quite simply, to slow down – to take a long look at a situation at work before acting. Really, her advice is like winding the watch.

Reyer says that “slowing down is not about doing less; it is about working more effectively and efficiently.” She says: “[we must] understand the cost of haste. For many of [her] clients, much of the pressures they face comes from fixing mistakes. Look at the project that you and your team work on. What happens on rush jobs when you have insufficient time to plan? Consider the impact on quality and cost, along with the effect it has on morale when people know that they can’t do their best work.”

She says that the old adage “measure twice, cut once” makes sense in building a house, making a dress, or working with people in business. And imagine the impact on your capacity – your personal margin – if we all just took a deep breath, wound that watch, and then moved forward in more thoughtful, calculated ways.

Followership

By Warren Bennis
Submitted by
Tom Mauro, CEO
Colorado Performance Excellence

It is probably inevitable that a society as star-struck as ours should focus on leaders in analyzing why organizations succeed or fail. As a long-time student and teacher of management, I too have tended to look to the men and women at the top for clues on how organizations achieve and maintain institutional health. But the longer I study effective leaders, the more I am convinced of the under-appreciated importance of effective followers.

What makes a good follower? The most important characteristic may be a willingness to tell the truth. In a world of growing complexity, leaders are increasingly dependent on their subordinates for good information, whether the leaders want to hear it or not. Followers who tell the truth, and leaders who listen to it, are an unbeatable combination.

Movie mogul Samuel Goldwyn seems to have had a gut-level awareness of the importance of what I call "effective backtalk" from subordinates. After a string of box-office flops, Mr. Goldwyn called his staff together and told them: "I want you to tell me exactly what's wrong with me and MGM, even if it means losing your job." Although Mr. Goldwyn wasn't ready to give up the ego-massaging presence of "yes men", in his own gloriously garbled way he acknowledged the company's greater need for a staff that speaks the truth.

Like portfolios, organizations benefit from diversity. Effective leaders resist the urge to people their staffs only with others who look or sound or think just like themselves, what I call doppelganger, or ghostly-double, effect. They look for good people from many molds, and then they encourage them to speak out, even to disagree. Aware of the pitfalls of institutional unanimity, some leaders wisely build dissent into the decision-making process.

Organizations that encourage thoughtful dissent gain much more than a heightened air of collegiality. They make better decisions. Like good leaders, good followers understand the importance of speaking out. More important, they do it. Over thirty years ago, when Nikita Khruschev came to America, he met with reporters at the Washington Press Club. The first written question he received was: "Today you talked about the hideous rule of your predecessor, Stalin. You were one of his closest aides and colleagues during those years. What were you doing all that time?" Khruschev's face grew red. "Who asked that?" he roared. No one answered. "Who asked that?" he insisted. Again, silence. "That's what I was doing," Mr. Khruschev said.

Even in democracies, where the only gulag is the threat of a pink slip, it is hard to disagree with the person in charge. Several years ago TV's John Chancellor asked former Presidential aides how they behaved on those occasions when the most powerful person in the world came up with a damned fool idea. Several of the aides admitted doing nothing. Ted Sorenson revealed that John F. Kennedy could usually be brought to his senses by being told, "That sounds like the kind of idea Nixon would have."

Quietism, as a more pious age called the sin of silence, often costs organizations - and their leaders - dearly. Former President Ronald Reagan suffered far more at the hands of so-called friends who refused to tell him unattractive truths than from his ostensible enemies.

Nancy Reagan, in her memoir, *My Turn*, recalls chiding then Vice-President George Bush when he approached her, not the President, with grave reservations about White House chief of staff Donald Regan.

> *"I wish you'd tell my husband," the First Lady said. "I can't be the only one who's saying this to him."*
> *According to Mrs. Reagan, Mr. Bush responded, "Nancy, that's not my role."*
> *"That's exactly your role," she snapped.*

Nancy Reagan was right. It is the good follower's obligation to share his or her best counsel with the person in charge. And silence - not dissent - is the one answer that leaders should refuse to accept.

Effective leaders reward dissent, as well as encourage it. They understand that whatever momentary discomfort they experience as a result of being told from time to time that they are wrong is more than offset by the fact that reflective backtalk increases a leader's ability to make good decisions.

Executive compensation should go far toward salving the pricked ego of the leader whose followers speak their minds. But what's in it for the follower? The good follower may indeed have to put his or her job on the line in the course of speaking up. But consider the price he or she pays for silence. What job is worth the enormous psychic cost of following a leader who values loyalty in the narrowest sense?

Perhaps the ultimate irony is that the follower willing to speak out shows precisely the kind of initiative that leadership is made of.

A COLLEAGUE AND DISTINGUISHED TEXAN

Susan Mellott PhD, RN, CPHQ, FNAHQ

INDIANA, Pa. – A Houston woman is a recipient of the 2009 Indiana University of Pennsylvania Distinguished Alumni Award.

Dr. Susan Mellott, CEO and founder of Mellott & Associates, received the award in recognition of her leadership in health-care quality, business and nursing education.

The Distinguished Alumni Award, the highest award given by the Alumni Association, is offered to alumni who have achieved distinction in their chosen fields or have demonstrated loyal and active service to their alma mater.

Mellott earned a Bachelor of Science degree in nursing from IUP in 1973. She earned a master's degree in nursing from the University of Pennsylvania in 1978 and a doctorate in health education and wellness from Texas A&M University in 1987. She is a fellow of the National Association for Healthcare Quality and a certified professional in health-care quality.

Mellott & Associates is a full-service health-care consulting company in Houston. The company's primary focus is on performance improvement, cost reduction, case management, reorganization and the survey-preparation process for the Joint Commission on the Accreditation of Healthcare Organizations and Center for Medicaid and Medicare Services.

Mellott & Associates developed and implemented the Specialty Performance Measurement System database of quality measures for long-term care hospitals to utilize to meet the Joint Commission ORYX requirements. The system is included on the Joint Commission's list of acceptable systems for ORYX, a measurement and improvement initiative implemented in 1997.

Mellott is an adjunct assistant professor at Texas Woman's University's Houston campus, where she teaches in the master's in nursing administration track. She is a retired lieutenant colonel in the U.S. Army Reserves, in which she completed 20 years of service as chief nurse, training officer, supervisor and staff nurse. She served in Iraq during Desert Storm in 1990 and 1991 and received the Bronze Star.

Before establishing her consulting company, Mellott was manager of nursing, quality and clinical performance at Sisters of Charity Healthcare System. She also served as director of nursing at Sharpstown General Hospital and was an associate professor and coordinator of the women's and children's division of the undergraduate program at the University of Texas School of Nursing in Houston.

She co-authored the book "Childhood Cancer: A Nursing Overview." She was an editor of the sixth edition study guide for the Certified Professional in Healthcare Quality designation, and she previously served as the editor of the Journal of Healthcare Quality, a publication of the National Association for Healthcare Quality. She has published articles and is the author of several chapters in professional books. She speaks throughout the country regarding health-care quality and other health-care topics.

Mellott is a past president of the Texas Association for Healthcare Quality and has served on its board since 2002. She is a member of the Texas Gulf Coast Association for Healthcare Quality, and Sigma Tau Theta, where she has served on numerous committees and in executive leadership roles. She is currently a director on the board of the American Association for Legal Nurse Consultants Houston Chapter.

Mellott has served on the Safety and First Aid Committee for the Houston Livestock Show and Rodeo for more than 20 years. The livestock show and rodeo provides college scholarships to high school students in each county in Texas.
Mellott and her husband, Scott, have one daughter and two grandchildren.

Editor's Note: *I am impressed by Stu's insight into human nature. This author about successful sales, knows what makes people tick.*

Anticipating Your Negotiator's Style

Stu Schlackman
Competitive Excellence

Robert Menard's book "You're the Buyer-You Negotiate it" does an excellent job assessing the characteristics of the four personalities as it relates to their negotiating style. Robert uses a model which expresses their styles in terms of Analytical, Amiable, Practical and Extravert which nicely correlates to our model of Green, Blue, Gold and Orange. The model Robert uses shows a chart with two axes that categorizes their style in regards to whether they lean towards Reserved (Ask) or Assertive (Tell) on the horizontal axis and Logical (Withhold) or Emotional (Display) on the vertical axis. We'll call the vertical axis the Reason/Emotion line. This correlates to the top left brain quadrant that favors thoughts over feelings and the bottom right brain quadrant favoring feelings over thoughts. The horizontal axis is known as the Assertiveness line. Those that are reserved prefer asking and those that are assertive prefer telling.

In our model this all translates to:

Analyticals = **Greens**
Amiables =**Blues**
Practicals = **Golds**
Extraverts = **Oranges**

The **Green** style for negotiations is high reason and low assertiveness. They think carefully and methodically and ask the tough questions. The will read up in advance and have all the information prepared when getting ready for the negotiation. They hold their cards close to the vest and battle with logic.

The **Blue** style is high emotion and low assertiveness. They follow the rules and value the Win-Win result in order to build a long term relationship with the client. Blues are more likely to acquiesce to satisfy the needs of the client.

The **Gold** style is high assertiveness and high reason. Golds will go point for point and can get aggressive when negotiating. Deadlines and timeframes are critical to their needs. Golds also tend to fall into the profession of finance, purchasing and procurement therefore making price, service level agreements and terms & conditions of high importance.

The **Orange** personality is high assertiveness and high emotion. Oranges look at the negotiation as a game. They need to score points and feel like they have won. It's important for the other side to win, but the Orange must have their needs met. Oranges also lack patience if a negotiation takes a long period of time.

Negotiating is a common practice in the business world both between buyers and sellers and also internally throughout the various organizations within a company. There are two aspects to a negotiation. There is a business component as well as a personal one. Both are equally important but if you can determine the other side's personality style you will be able to discern which might actually be more important. Your right brained negotiators are Orange and Blue and tend to focus on the personal aspects of the negotiation, the subjective criteria and the intangibles. Your left brained negotiators will lean towards the business aspects and focus on the objective points and the tangibles.

When you enter a negotiations keep the following in mind:
What are the critical points of contention that are keeping you from gaining agreement?

Take into account the other side's personality style to determine what is most important from their perspective- Total cost of ownership, Quality, Service or Delivery?

What can you give up that is important to the other side that is not much of a sacrifice to your position?

Sometimes intangible points are just as important as the tangibles. It all depends on how they are valued by the client.

Knowing their personality style can give you that extra edge to make the deal happen!

"A high level of backbiting politics, no teamwork, no set of shared business values, combine in a sure recipe for stagnation. This is a deadly combination.
- Robert H. Waterman

Quality Texas Foundation Names 22 Organizations For Performance Recognition

All Demonstrating Strong Dedication to Quality and High Performance

MEET THEM ALL AT THE TEXAS QUEST FOR EXCELLENCE CONFERENCE JUNE 22-23

Texas Award for Performance Excellence

THE HIGHEST LEVEL OF QUALITY

A role model organization demonstrating exceptional performance in all areas of organizational management – leadership, strategic planning, customer and market focus, measurement analysis and knowledge, workforce focus, process management and business results.

Baylor Regional Medical Center at Grapevine

Achievement Level

Well-deployed, effective, systematic approaches to organizational management, with good performance levels and trends evaluated against industry standards.

Baylor Specialty Hospital
Baylor Medical Center of Waxahachie
The City of Irving
Western Extrusions, Inc.

Progress Level

Demonstrates a sound, balanced approach to organizational management and performance improvement.

Raytheon SAS Advanced Products Center (APC)
Baylor Regional Medical Center of Plano
Medical Center of Lewisville
Northwood University, Texas Campus
Mesquite ISD
Weatherford ISD
K&N Management
JPS Health Network

Commitment Level

Demonstrates good performance and commitment to a systematic approach to organizational management and performance improvement.

US Leadership
Driscoll Children's Hospital

Engagement Level

Demonstrates deployment of systematic approaches to organizational management.

TMAC-Metroplex
St. Luke's Episcopal Health System
TALEM, Inc.
Victoria ISD
Palo Alto College
Standard Controls, Inc.
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TAPP into the PDCA Cycle to Make Improvements in Public Health



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One of the basic functions of managing a successful process is first to make sure it is in control and then set realistic performance targets that are monitored on a regular basis through measurement of key quality characteristics (KQC's) related to process parameters. As long as the process stays in control and achieves its targets we continue to monitor its progress and leave it alone. We take action after we observe and document an established gap between the processes's observed performance and actual performance.

Why do we measure?

- If you cannot measure something , you cannot understand it,
- If you cannot understand it, you cannot control it,
- If you cannot control it, you cannot improve it. [i]

Often when we detect a deviation in our process we do not know what we should do to correct it and bring it back into compliance. Too often we make arbitrary adjustments without a real analysis of the root cause of the deviation we are observing. Such arbitrary adjustments are a type of tampering, which usually do not improve performance, and often result in further process perturbation.

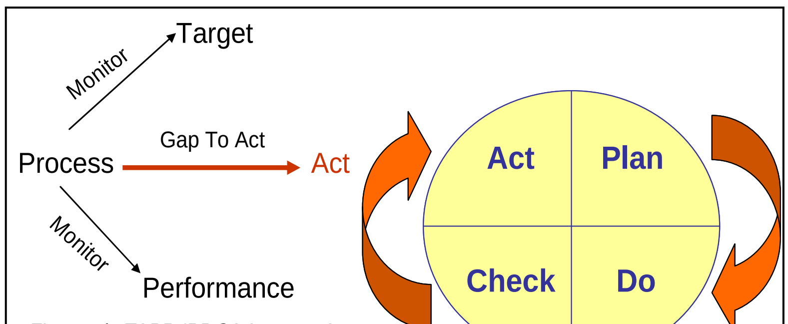

Figure 1: TAPP/PDCA Integration

As shown in the TAPP/PDCA Integration Model in figure 1, this monitoring of a process should be done on a regular basis so that we are able to detect any shifts or a sudden change that may cause a deviation from the process performance target has been set. The Target or goal drives our improvement efforts to the Act stage of the Plan-Do-Check-Act cycle. Process provides the structure by which we monitor Performance.

When monitoring a process we want to make sure that we identify key quality characteristic (KQC) measures that relate to our process design parameters. These KQC measures of a process can be in the form of indicators of Capacity, Process, Outcome, or all three depending on the process. As shown in Figure 2, when we measure a process it is best to measure all three indicators. When we understand a process capacity it should lead us to the critical parameters of how the process produces its output. We then understand how these outputs impact the community and our customers.

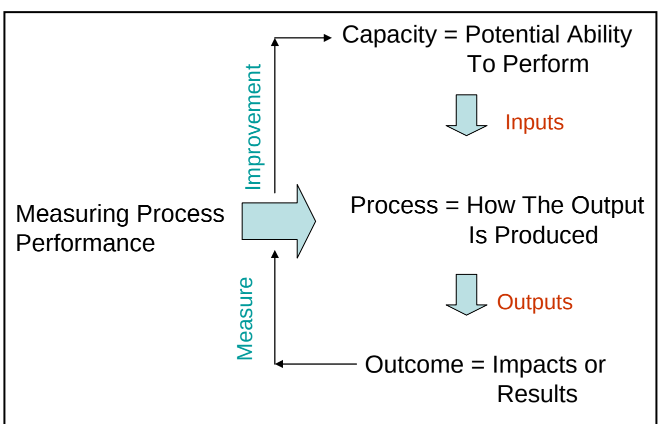

Figure 2

Control charts are the foremost method to analyze and monitor KQC's by assessing the process capability and stability. A control chart is a time series analysis that measures the performance of a process longitudinally. The process stability reflects the presence or absence of special cause variation, while the process capability measures the performance on a specific KQC in a stable process. There is a constant dynamic between process stability and capability. If a process is not stable, then the special cause variation needs to be identified and corrected. If a process is stable, then it must be determined whether the performance target for the KQC is met. If the process is not performing at the target level, then extensive process re-engineering is necessary.

Performance measurement is an important part of ensuring that a process is able to show how it is performing. Performance measurement can be both qualitative and quantitative. It should be focused on the critical aspects of a process that show their effects on the public and our customers.

These three types of performance measures are:

- Capacity Measures relate to the potential ability of the process to produce or perform at a certain level. Such as:
  - Health department workforce turnover rate
  - Completion of an annual health profile by every Local Health Department (LHD)
- Process Measures relate to those parameters that define how the process produces its output. Such as:
  - Number of no-show appointments at the Women, Infants and Children's (WIC) clinic.
  - % of women who receive adequate prenatal care
- Outcome Measures are something that result or follow from an event taking place. Such as:
  - Number of Influenza deaths
  - Multi-drug resistant tuberculosis cases

It is necessary to use measures which are considered important by our customers, easy to compute, related to standards, and promote accountability that leads to desired behavior changes.

A gap is when there is a difference between the process performance and the target value it is supposed to achieve. The gap could be a positive one in which the process is performing above the assigned target value. When we consistently have a large positive gap it may be time to review the target value and adjust it to reflect the ability of the process to deliver results. The target value may have been set too low at the outset and needs to be adjusted. The best situation of a process's performance is when the process is delivering results that are at the target value with minor variation in either direction.

The gap could be one which is a small deviation in either the positive or negative direction. These types of deviations need to be monitored over time to see if minor process adjustments may be needed to correct any consistent negative deviations from the target value. These types of adjustments are just quick fixes without a major problem solving effort.

When we have major negative gaps between the actual process performance and its target value that cannot be corrected by a quick fix, we need to move to "Act". Major negative gaps require a thorough process analysis that can be accomplished through the use of the PDCA cycle as shown in Figure 3.

When gaps are uncovered we need to investigate them thoroughly to decide if what is needed is process improvement (removing special causes) or process reengineering (removing common causes). Remember that Dr. Deming stated that all problems encountered in a process are categorized as common causes (about 94% of the time) and special causes (about 6% of the time).

We must remember that every system will have some amount of variation of results, common cause variation occurs naturally in every process. The way to improve common cause variation is to change the existing system.

Many of the gaps we encounter in performance may need process reengineering to reach the level of performance we desire as an organization. [ii]

We TAPP into the PDCA cycle to get improvement to close the gap between the desired state (Target value) and the current state process Performance).

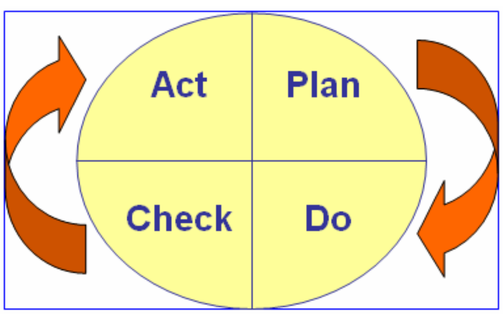

Figure 3 PDCA Model

The Plan-Do-Check-Act model provides a methodology to systematically analyze a process's performance to ensure we find the root cause of any observed deviation from a set target value.

The steps in the PDCA model are as follows:

- **Plan** - changes aimed at improvement; matched to root causes
- **Do** - carry out changes; try first on small scale
- **Check** - see if you get the desired results
- **Act** - make changes based on what you learned; spread success

Once the changes in process steps are made, we begin to monitor the process through our measures and if they show the process to be back in control, we simply continue to monitor it.

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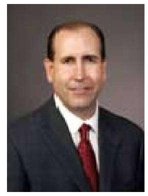
[i] Harrington, H. James; Business Process Improvement, McGraw Hill, 1991. Page 164.

[ii] Gryna, Frank M.; Quality Planning & Analysis, McGraw Hill, 2001, p 157

A Lesson in Leadership



T. Douglas Lawson
President
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Texas Award for Performance Excellence
Recipient 2009

Common themes in high performing organizations include the strength of their leadership team, their ability to align employee efforts with a common purpose, and the manner in which they approach employee engagement. These traits are also recognized within the context of quality awards such as the Texas Award for Performance Excellence and the Baldrige Quality Award. In healthcare we spend a significant amount of time evaluating outcomes, assessing our quality of care, and improving our clinical outcomes. However, as an industry we do not spend nearly enough time assessing how these key drivers of overall organizational performance result in improvements in the broader patient experience.

The Leadership team at BRMCG carefully chose the Texas Award for Performance Excellence model and the Baldrige Assessment process in the belief that the Baldrige methodology provided us with a tool that would focus on overall organizational excellence and align our mission, vision and values with the day-to-day work that occurs throughout the hospital. We strongly believe this methodology puts us in the best position to connect the thousands of daily acts of our over 1,200 staff members with the vision of Baylor Health Care System. This process by design allowed us to amplify our existing efforts to be trusted as the best place to give and receive safe, quality and compassionate care in our related focus on the four components of our Circle of Care: People, Quality, Service and Financial Stewardship.

We did not embark on this journey with the intention of winning an award, but with the specific goal of using this methodology as a way to further align our existing efforts and gain critical feedback regarding best practices. Utilizing this process has also allowed us to do something many consider to be one of the most difficult challenges in healthcare: To take an organization that is doing good work in all levels and creating the energy within the organization to perform at an even higher level. This competitive process allowed us to benchmark ourselves with some of the best organizations at a state and national level and was one of the primary vehicles that created the energy necessary to move the organization to the next level.

Our journey began in earnest almost three years ago with a growing realization that our Emergency Room, while providing adequate care, was not meeting the expectations of our community. Our Emergency Room ranked in the bottom 10% of hospitals nationally in patient satisfaction and led many in our communities to travel outside our service area for medical emergencies.

Over the last three years our efforts to focus our team on identifying and refining the critical processes, such as the admission and discharge processes, the process to order and receive a diagnostic test, and the manner in which we communicate with our patients and their families have resulted in significant improvements. These efforts, combined with a commitment to hold ourselves and our teams accountable for improving in each of these areas, resulted in our patient satisfaction improving from the bottom 10%, to the top 10% of hospitals nationally in patient satisfaction. Along the way, we also significantly increased the number of patients visiting the emergency room and reduced the number of patients who left our emergency room without being treated

In a healthcare environment where the transparency of clinical outcome is increasing and our communities are assuming that all or most hospitals deliver the same if not similar clinical outcomes, patient satisfaction has become a key determinant in the consumer value equation. A key learning point for our organization has been the recognition that excellence is much more than a quality outcome but a complete experience, and that by measuring, monitoring and benchmarking patient satisfaction we can elevate the entire experience for both patients and families. This is resulting in a competitive advantage in a very competitive market.

A transformation such as this only occurs when there is a full understanding of the core and supplemental processes, tools to measure results, the willingness to respond to the data, and discipline to hold leadership and their related teams accountable for improved outcomes. Our leadership team's ability to amplify the vision of the organization at the staff level is the driving force behind this improvement. Said another way, the ability of leaders to create an information-driven culture focused on best practices and positive outcomes coupled with the creation of high performing teams is key.

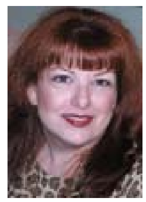
Recruitment of the best and the brightest staff has been a fundamental philosophy of Baylor Health Care System. It is important to performance in almost every area and it is the single most important driver of organizational excellence. The key is in identifying individuals with not only the technical skills, but those that have personal values that align with our System. Recruitment of this nature requires a multidisciplinary effort beginning with the initial applicant pool, and continues through the behavioral-based interview process. This is difficult, time consuming work. However, like any important initiative, the amount of work you put into a process or an outcome corresponds almost exactly with the output you receive. The work we are doing to recruit and retain individuals with the right technical training and experience and personal values that align with BHCS is central to our success.

In theory, if it can't be measured, it can't be improved. One measure of our success in this particular area is increasing first-year and first to third-year retention. Focusing on these two metrics has been imperative in understanding our ability to not only attract the right person to begin with, increasing 1st year retention, but also our ability to retain this new talent, 1st to 3rd year retention.

I would like to say that it is the intellectual abilities of our leadership team that is making the difference. However, as important as intellectual abilities may be, it is the hearts and souls of our leaders that are truly making the difference. It is our ability to engage employees in the passion of healthcare and our ability to align the hard work that occurs on a day-to-day basis throughout our hospital and our health system that is resulting in the improvements we are seeing today.

Throughout the Texas Award for Performance Excellence journey there has been a committed group of staff dedicated to working together to care for patients and their families as if they were a member of their very own family. It is truly a privilege and honor to be a part of a team with a passion for excellence and a mission to do great work.

Using the Baldrige Criteria to Assess Current Levels and Improve Measurement, Analysis and Knowledge Management Processes



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Baylor Regional Medical Center at Grapevine
Texas Award for Performance Excellence
Recipient 2009

In mid 2007, our new hospital president arrived. One of the first questions he asked me was, "Is there a state level program for performance excellence in Texas?" Having worked at a previous TAPE recipient hospital, I replied, "Yes", and thus began our journey.

We began by reviewing the criteria in depth and were about to begin the organizational self assessment, when, with the help of an experienced consultant, we quickly moved into developing an application instead. Our first experience at Baylor Regional Medical Center at Grapevine (BRMCG) was with a Progress Level application. We received our feedback report and began the process of working through the criteria and the opportunities for improvement that were identified in order to develop the Award level application.

During our review of the Category 4 feedback with the criteria, we compared what we were measuring; how we chose what we were measuring; what our current performance was as compared to goals, state and national outcomes; and the analysis, alignment, displaying and communicating those results based upon the criteria requirements.

All of our performance measures are based in the 4 Pillars that comprise our Circle of Care: People, Quality, Service and Finance.

Most of the health outcome metrics are required by one regulatory entity or another. For example: The Core Measures (AMI; HF, CAP; HOP; SCIP), Mortality (Risk-adjusted inpatient and 30-day post admission); Central Line Bloodstream Infections, Ventilator Associated Pneumonia, and surgical site infection rates, among others. Other types of metrics developed are unit-specific and involve a specific process or process improvement activity, a new service or technology that we want to monitor, or a new vendor.

Other facility-wide metrics included:

- Patient and Customer focus: patient satisfaction metrics that encompass a variety of providers and process satisfaction measures, market share; community outreach, among others.
- Financial and Market focus: various departmental visit volumes, inpatient admissions, outpatient registrations, deliveries, supplies expense, operating margin, gross and net revenues, market share analysis, among others.
- Workforce Focused Outcomes: employee engagement index, nursing engagement index; staff retention, vacancy rates, professional certifications, employee testing and immunization rates, safety inspections, among others.
- Work Systems and Processes: cardiac catheterization procedures; Radiology turn-around-time and critical reporting, Emergency Department (ED) "left without treatment" rates, ED door to medical staff examination time (in minutes), Rapid Response Team calls and length of stay, among others.
- Leadership Outcomes: leadership effectiveness, accomplishment of action plans, ethical behavior, fiscal accountability, accreditation outcomes, legal and regulatory compliance, community organization involvement and activity, among others.

When we reviewed our outcomes in conjunction with the criteria, we discovered we had some significant process improvements we could identify; however, we had not put the narrative with the data. This was a fabulous opportunity to put the action plans and the data into a comprehensive format.

For example, we were experiencing opportunities for improvement with our SCIP (Surgical Care Improvement Project) outcomes in late 2007 and early 2008. We developed a concurrent case review process with a daily case review log. We tested the process and explained what we were doing in multiple venues, but had not developed a comprehensive set of documents and information that contained all the key elements necessary to explain each step and who was responsible. In preparation for the TAPE application and the site visit, we were able to put these items together in a format that was easily understandable.

There were other outcomes and processes in which we had experienced significant improvements that we needed to capture. Our leadership team worked very closely to pull together all the action plans that identified process improvements that had already taken place. But more importantly we were able to pull together all the current process improvement projects that were helping to improve our identified opportunities.

One of our other key focus areas has been information technology and knowledge management, especially with the implementation of our electronic health record (EHR). We are transitioning from a paper environment to an electronic environment that will still entail some use of paper tools for a short period of time. We expect to be virtually paperless in the not too distant future.

When we were moving our application from the Progress Level to the Award Level, we pulled the original team together that answered the criteria in 2007 and 2008. We immediately knew that the Category 4.2 team had to expand from information technology and services staff to be multidisciplinary.

We included administration, nursing (leadership and front-line staff), physicians and other members of the health care delivery team so we had a 360° view of what we did and how we did it. We had process users and developers participate so we could fully evaluate the impact each role had. Using this approach, we were also able to get “on the spot” feedback so we better understood how technology was being viewed and used. This further sparked multiple conversations about user friendliness, training needs, equipment upgrades, and future equipment selection. A team known as the Facility Implementation Team (FIT) leads this effort, coordinates the EHR implementation information, and works with IS to accomplish the necessary goals of such an important endeavor.

The other take-aways from using the criteria to improve organizational performance are:

- Evaluating outcomes over time (at least 3 years of data, but hopefully 5 years) is invaluable in understanding each organization’s journey.
- Understanding what is measured and how it fits into the strategic plan and organizational goals are paramount in keeping focused.
- Setting achievable goals and working as a team to achieve those goals always pays off.
- Educate, educate, educate……
- Include at least one member who has little to no knowledge of the subject matter on an improvement team. They are a great resource for what the team may be missing.
- If not already developed, begin to put together a rapid cycle improvement methodology that facilitates improvements and teach it to everyone. This includes organizational leadership to the front line staff to environmental services and to anyone else that can help to improve a process.
- Become transparent. Post outcomes in public areas, in break rooms, in rest-rooms or anywhere else that can be thought of.
- Most importantly, writing down the answers to the criteria questions is only the beginning of the improvement journey.

The health care regulatory environment changes rapidly, as do customer and payer expectations and requirements. In order to navigate through change, organizations need to keep pace with all the external changes that have an internal impact.

Even though Baylor Regional Medical Center at Grapevine has been identified as a “role-model” organization by the Texas Quality Foundation, our improvement journey has only begun. There is always something to implement and something to improve.

WHY IS CHANGE SO DIFFICULT, WHEN IT IS SO COMMON AND SO NEEDED

He who rejects change is the architect of decay. The only human institution which rejects progress is the cemetery. ~Harold Wilson

Faced with the choice between changing one's mind and proving that there is no need to do so, almost everyone gets busy on the proof. ~John Kenneth Galbraith

The only difference between a rut and a grave is their dimensions. ~Ellen Glasgow

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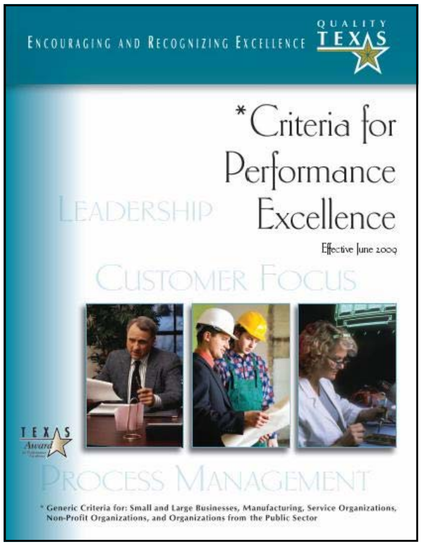

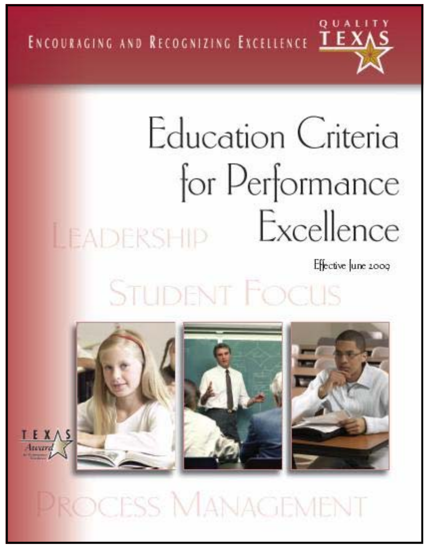

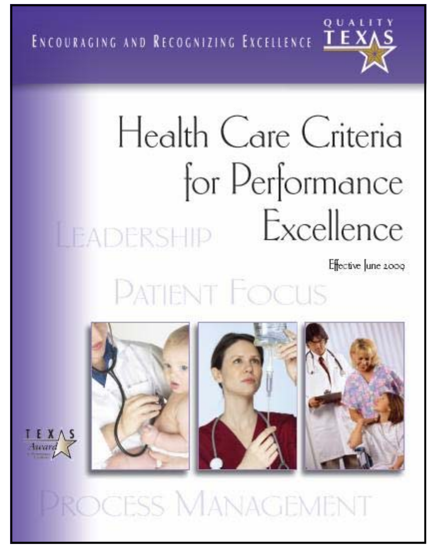

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