the importance of relational strategies in microsystem improvement

beyond the technical
Without overthinking, generate a list of:

common strategies, methods, tools, approaches used in your organization to support improvement

From H. Bevan and G. Henriks

The essential flaw of [quality improvement methodology] is that, when implemented, it tends to reinforce the mechanistic and hierarchical models that are consistent with the mental maps of most managers

Chris Argyris,

Flawed Advice and the Management Trap

Read more at: http://www.slideshare.net/HelenBevan/signed-sealed-delivered-leading-improvement-in-a-new-era and http://www.slideshare.net/jurgenappelo/management-30-workout
two kinds of knowledge

professional knowledge
• subject
• discipline
• values

improvement knowledge
• system
• variation
• psychology
• theory of knowledge

patient by patient improvement of healthcare + systematic improvement of processes and systems

continuous improvement of health care

Adapted from Batalden & Stoltz (1993)

improvement knowledge

Deming
TECHNICAL systems
- mapping
- fishbone variation
- measurement knowledge
- plan-do-study-act psychology
- commitment maps
- force-field analysis

RELATIONAL systems
- sympathy
- complexity variation
- narrative knowledge
- sensemaking psychology
- curiosity
- reflective practice

RELATIONAL STRATEGIES: SYSTEMS THINKING
understanding of a system: **sympathy**

recognize that “we are part of the system”

Anderson & Johnson (1997)

relate to the system and those in the system
- what is your role?
- how do your actions or inactions affect the ability to change?

understanding of a system: **complexity**

1) use the lens of complexity: interdependence & individuality
2) provide minimum specifications: simple rules
3) lead with clockware & swarmware in tandem: standardization & experimentation
4) tune to the edge: ‘just enough’ information flow, diversity, connectivity, power differential, & anxiety

Adapted from Zimmerman, Lindberg, Plsek (2008)
understanding of a system: complexity

5) work with paradox: wicked questions
6) go for multiple actions rather than consensus
7) listen to the shadow system: it's where the creativity lives
8) grow by chunking: link simple systems that work well
9) mix cooperation with competition

Adapted from Zimmerman, Lindberg, Plsek (2008)

Example: scope overlap in physicians

Technological advances have made it possible for radiologists and cardiologists to reshape damaged arteries, something that used to require the skills of a vascular surgeon.

In most places, a senior administrator would be put in the unenviable position of representing the system's interests, while serving as negotiator and referee among these powerful constituencies.

Atlantic Health Systems took a CAS Approach...
### Example: scope overlap in physicians

A CAS approach instead involves:

1) "convening a group with representatives of all three specialties" (increasing diversity, connections among agents, and anxiety);
2) giving them honest information about the system's resources and requirements (increasing information flow and tuning the power differential);
3) "asking them to develop a plan" (in the end, decreasing diversity and power differential); and
4) "telling them that the system won't invest in the procedure until they have come up with such a plan" (increasing power differential and anxiety).

This approach led to many, creative, successful, collaborative relationships with physician groups at a time when many health care organizations report nothing but contention.

who has heard...

“if you can’t measure it, you can’t manage it”

Deming

It is wrong to suppose that if you can’t measure it, you can’t manage it – a costly myth.

The New Economics (1994)
Deming

The most important things cannot be measured.

The most important things are unknown or unknowable.

Out of the Crisis (1994)

variation: the power of narrative

patience and trust are essential for preparing to listen to stories… “we should listen with three ears: two on our head and one in our heart”

Archibald (1997)
theory of knowledge: sensemaking

organizational sensemaking is interactive, social, shared

“knowledge is not something people possess in their heads but rather something they do together”

Weick (2009)
from decision-making to sensemaking

If I make a decision it is a possession. I take pride in it, I tend to defend it and not listen to those who question it. If I make sense, then this is more dynamic, and I listen and I can change it. A decision is something you polish. Sensemaking is a direction for the next period.


leader’s role in sensemaking

When bewildered people ask, “what’s the story?” the crucial thing is to get them moving, observing, updating, and arguing about feasibility and plausibility. A powerful means to do this is for the leader to answer the question by saying, “I don’t know what the story is, but let’s find out”

Weick (2009)
Continually inquire into the “unchanged present.” Living systems adapt & respond to their internal and external contexts. They resist intentional change partly because there are competing commitments and assumptions which effectively hold the unchanged present in place…

Batalden (2011)
psychology: reflective practice

Adapted from Senge, Kleiner, Roberts, Ross, & Smith (1994)

levels of understanding

<table>
<thead>
<tr>
<th></th>
<th>Action Mode</th>
<th>Time Orientation</th>
<th>Way of Perceiving</th>
<th>Questions you would ask</th>
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<tbody>
<tr>
<td>Events</td>
<td>react!</td>
<td>present</td>
<td>witness event</td>
<td>what is the fastest way to react to this event now?</td>
</tr>
<tr>
<td>Patterns</td>
<td>adapt!</td>
<td></td>
<td>measure or track patterns of events</td>
<td>what kinds of trends or patterns of events seem to be occurring?</td>
</tr>
<tr>
<td>Structure</td>
<td>create change!</td>
<td>future</td>
<td>systems thinking tools</td>
<td>what structures are in place that are causing these patterns?</td>
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System Thinking Basics, Anderson and Johnson, 1997
what about mental models?

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<td>reflect!</td>
<td>past-present-future</td>
<td>reflection tools</td>
<td>what is my role in this? why are things the way they are?</td>
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left-hand column
ladder of inference
johari window

Johari window

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<tr>
<th>known by self</th>
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<tbody>
<tr>
<td>known by others</td>
<td>OPEN</td>
</tr>
<tr>
<td>unknown by others</td>
<td>HIDDEN</td>
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Luft (1984) from Luft and Ingham (1955)

seek out

“ruthlessly compassionate partners who will tell the truth”

Senge, Kleiner, Roberts, Ross, & Smith (1994)

integrating the technical and relational

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promise-making

For society and interdependent work to function, we must make promises to each other

Batalden (2011)
based on Arendt (2005)

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Batalden (2011)
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Batalden (2011)
**promise-making**

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<td>to patient: about one’s own role in the system</td>
<td>knowledge of the way personal performance contributes to the results experienced by the patient</td>
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<tr>
<td>to colleagues: about one’s own work</td>
<td>knowledge of the way one’s own work connects to the work of others and vice versa</td>
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Batalden (2011)

**works cited & consulted**


