Reinventing the Checklist: A Powerful, New Twist on a Classic Tool!

Presented by
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ABOUT ME

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Change Rx for HEALTHCARE

Your Prescription for Leading Change

KEELY KILLPACK, PhD
Agenda

✓ Meet the Speaker
❑ Learning Outcomes
❑ Meet the Audience
❑ The Case for Checklists
  ▪ Fundamentals
  ▪ Case Study
❑ Checklist Tool
  ▪ Examples
  ▪ Build Your Own
❑ Wrap Up
  ▪ Key Takeaways
  ▪ Questions
LEARNING OUTCOMES

- LEARN SOMETHING
- GET A COOL TOOL
- BUILD YOUR OWN CHECKLIST
Poll the Audience

☐ Are you going to ACMP 2018 in Vegas? (select only one)
  ▪ YES
  ▪ NO

☐ Member of a local ACMP Chapter? (select only one)
  ▪ YES
  ▪ NO

☐ Change Practitioner experience? (select only one)
  ▪ 1-3 years
  ▪ 3-5 years
  ▪ 5-10 years
  ▪ More than 10 years
THE CASE FOR CHECKLISTS

- THE FUNDAMENTALS
- CASE STUDY
REDUCE FAILURE

PURPOSE

COMPENSATE FOR LIMITS IN HUMAN MEMORY & ATTENTION
QUALITY

ENSURE
CONSISTENCY &
COMPLETENESS
WHEN EXECUTING A TASK

OUTCOME
Reinventing the Checklist: A Powerful, New Twist on a Classic Tool!  ACMP Webinar presented by Keely Killpack, PhD  © 2018 All Rights Reserved.
Poll the Audience

- Which kinds of checklists have you used? (select all that apply)
  - Priority
  - Time
  - Category

- Favorite or most frequently used? (select only one)
  - Priority
  - Time
  - Category
3 BASIC TYPES

PERSONAL
- POST-IT NOTES
- DAYPLANNER
- NOTEBOOK

TEAM
- FLIP CHART
- DRY ERASE BOARD
- POSTER

ELECTRONIC
- EMAIL TASKS
- SOFTWARE
- MOBILE APPS
What types of checklists do you have experience using? (select all that apply)

- Personal
- Teams
- Electronic or Apps

Do you use checklists in your change practice? (select only one)

- Rarely
- Often
- Standard Practice
THE CASE FOR CHECKLISTS

✓ THE FUNDAMENTALS

☐ CASE STUDY
## Leader Readiness Checklist – May 2016

<table>
<thead>
<tr>
<th>MONTH</th>
<th>DATES</th>
<th>MILESTONE</th>
<th>OBJECTIVE</th>
<th>PROGRAM LEADER</th>
</tr>
</thead>
<tbody>
<tr>
<td>May</td>
<td>5</td>
<td>Lab Readiness Meeting</td>
<td>Ongoing meeting of Oregon Network lab &amp; operational leaders to plan &amp; prepare for lab-specific CareConnect activities</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May</td>
<td>2, 9, 16, 23, 30</td>
<td>Operational Readiness Meeting</td>
<td>Weekly meeting of key Oregon operational leaders to develop and implement CareConnect staffing plans for training &amp; go-live</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May</td>
<td>5, 12, 19, 26</td>
<td>Network Adoption Team Meeting</td>
<td>Weekly meeting of Oregon Network operational &amp; clinical leaders to discuss ongoing CareConnect activities</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May</td>
<td>9</td>
<td>CGMC Medical Staff Meeting</td>
<td>Monthly CareConnect update for all Cottage Grove medical staff, including clinics</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May</td>
<td>11</td>
<td>Medical Exec. Meeting</td>
<td>Monthly CareConnect update for Medical Executive Committee members</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May</td>
<td>12</td>
<td>ARCR Meeting</td>
<td>Monthly meeting of Oregon Network and System Revenue Cycle Operational Leaders and CareConnect Team Leads to prepare for CareConnect go-live activities</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May 16</td>
<td>(PHMC, SHMC/CGMC)</td>
<td>Provider Readiness Update</td>
<td>Update to medical &amp; operational leaders to plan &amp; prepare for provider-specific CareConnect activities. This update specific to reflect on the May 1 NWN go-live from the provider view. Not meeting in person this month due to NWN go-live.</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May</td>
<td>16</td>
<td>Super User Enrollment Begins</td>
<td>Education team assigns classes in LMS (Learning Management System) &amp; managers schedulers super users for specific dates &amp; times</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May</td>
<td>16</td>
<td>Technical Dress Rehearsal begins</td>
<td>CareConnect Team verifies the connectivity and viability of all hardware, software and devices needed to support CareConnect implementation</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May</td>
<td>24</td>
<td>Clinical Readiness</td>
<td>Clinical &amp; operational leaders from Oregon Network meet to discuss key CareConnect activities. Delayed this month due to NWN go-live.</td>
<td>Name of Person</td>
</tr>
<tr>
<td>May</td>
<td>31</td>
<td>PHMC Provider Readiness Meeting</td>
<td>Update to medical &amp; operational leaders to plan &amp; prepare for provider-specific CareConnect activities.</td>
<td>Name of Person</td>
</tr>
</tbody>
</table>

**Legend:**
- 🧪 Testing
- ⏩ Training
- ⌐ Ready
- ⚪ Go-Live Planning & Support
- 🔴 Go-Live
THE CASE FOR CHECKLISTS

✓ THE FUNDAMENTALS
✓ CASE STUDY
CHECKLIST TOOL

- EXAMPLES
- BUILD YOUR OWN
**Leader Readiness Checklist – May**

<table>
<thead>
<tr>
<th>MONTH</th>
<th>DATES</th>
<th>MEETING</th>
<th>MEETING TITLE</th>
<th>OBJECTIVE</th>
<th>PROCUREMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 1</td>
<td>CAHPC</td>
<td>CAHPC Meeting</td>
<td>CAHPC Meeting</td>
<td>To discuss and plan for upcoming CAHPC events</td>
<td>Week 1 of May</td>
</tr>
<tr>
<td>May 2, 3, 4, 5, 6</td>
<td>CAHPC</td>
<td>CAHPC Meeting</td>
<td>CAHPC Meeting</td>
<td>To discuss and plan for upcoming CAHPC events</td>
<td>Week 1 of May</td>
</tr>
<tr>
<td>May 11</td>
<td>CAHPC</td>
<td>CAHPC Meeting</td>
<td>CAHPC Meeting</td>
<td>To discuss and plan for upcoming CAHPC events</td>
<td>Week 1 of May</td>
</tr>
</tbody>
</table>

**May 12**

- **CAHPC Meeting**
  - To discuss and plan for upcoming CAHPC events

**May 17**

- **Community Health Council Meeting**
  - To discuss and plan for upcoming Community Health Council events

**May 24**

- **CAHPC Meeting**
  - To discuss and plan for upcoming CAHPC events

**May 31**

- **CAHPC Meeting**
  - To discuss and plan for upcoming CAHPC events

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**Clinical Readiness Checklist**

- **April 2023**
  - Please complete these areas prior to our May 2023 Clinical Readiness meeting
  - Follow the steps outlined in your Client’s Manual before this meeting.

**Readiness Activities**

- **Identify your Accountability Profile:**
  - If not already done.

- **Identify Key Stakeholders in Change:**
  - May 12

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  - May 12

- **Identify Key Stakeholders in Change:**
  - May 12

- **Identify Key Stakeholders in Change:**
  - May 12

**Engagement & Communications**

- **Engage with key stakeholders:**
  - May 12

- **Engage with key stakeholders:**
  - May 12

- **Engage with key stakeholders:**
  - May 12

**Community Health Council Meeting**

- **Community Health Council Meeting**
  - To discuss and plan for upcoming Community Health Council events

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**Communication Check**

**What is really driving the change?**

**What would happen if we didn’t change?**

**What will we become through the change?**

**What’s in it for me?**
CHECKLIST TOOL

✓ EXAMPLES

☑ BUILD YOUR OWN
DOWNLOAD FILE

TOOL WALK-THRU

BUILD YOUR CHECKLIST
CHECKLIST TOOL

✓ EXAMPLES
✓ BUILD YOUR OWN
WRAP UP

- KEY TAKEAWAYS
- QUESTIONS
LEARNING OBJECTIVES
✓ Learn, Cool Tool, Build Your Checklist

3 BASICS
✓ Purpose, Outcome, Industries

3 STANDARDS
✓ Priority, Time, Category

3 TYPES
✓ Personal, Team, Electronic

CHECKLIST TOOL
✓ Samples, Build your Own
Audio or Type in Panel

QUESTIONS?
ABOUT ME

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Your Prescription for Leading Change

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