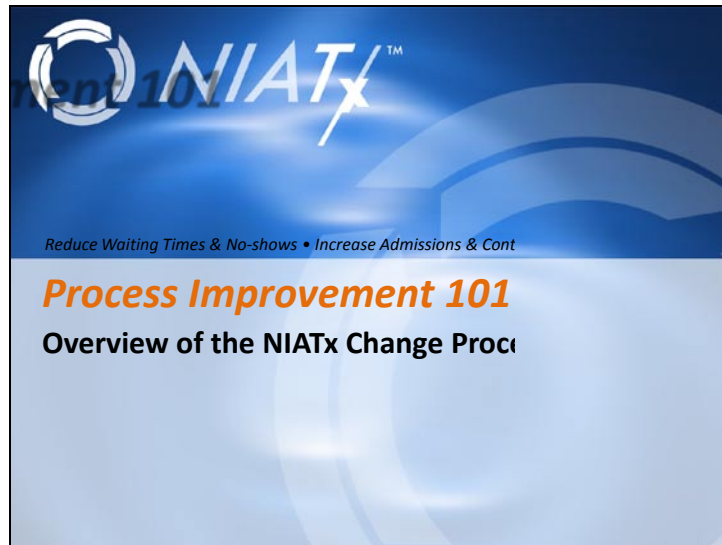
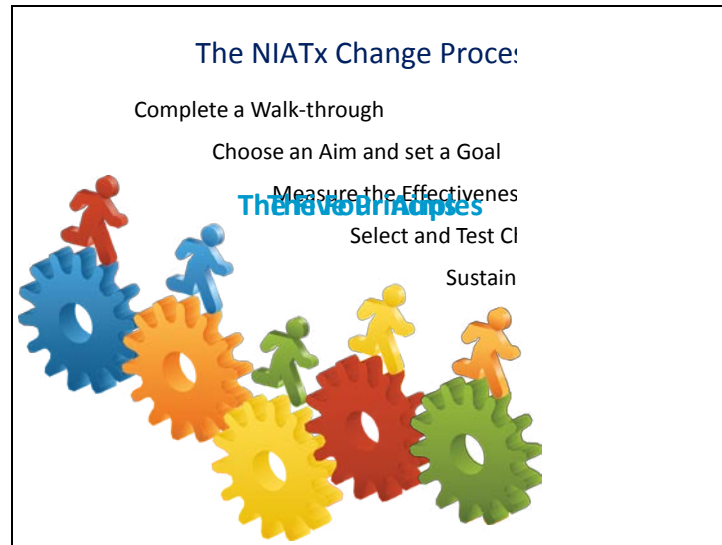


Slide 1

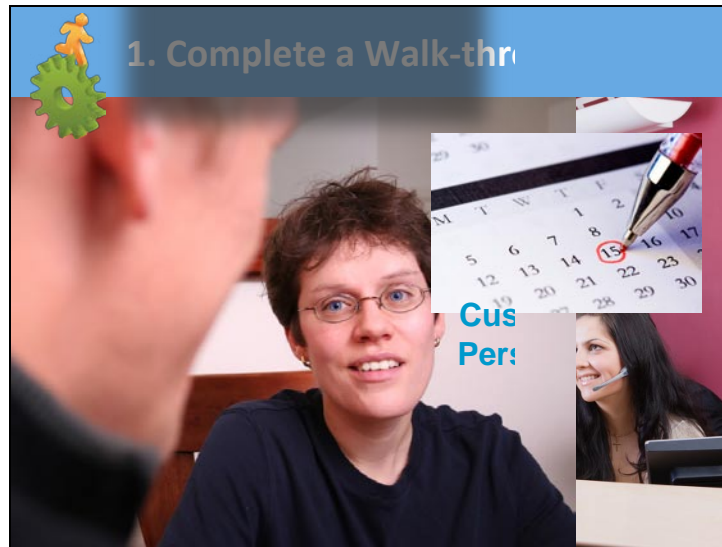


This section will cover the NIATx change process.



In the first part of this course, you learned about the 4 aims and how focusing on one of them helps to create successful change. You also learned about the NIATx principles and why understanding the customer is so important.

In this section, you will start to get a feel for how the process works, when all the components are pulled together.

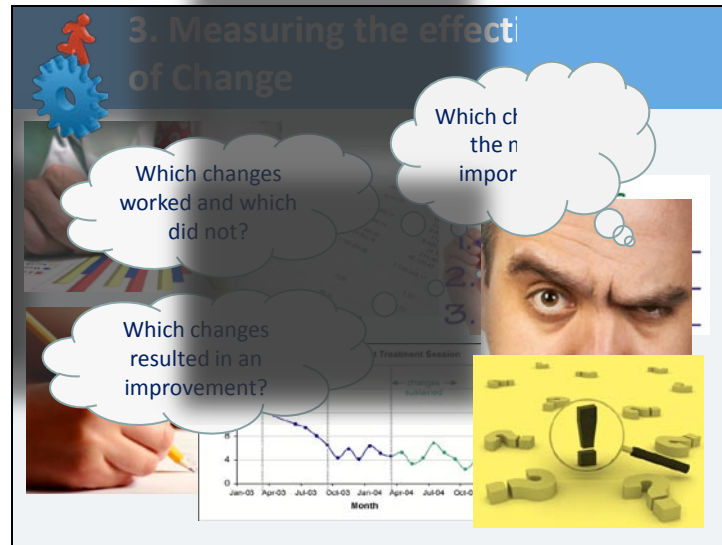


One of the best ways to understand your customers is to walk through the process as they do. Actually make the phone call, drive to the facility, enter the facility, and meet the receptionist. Assume this is your first time ever. What's it like? How does it feel? What works? What doesn't?

In a walk-through, you experience the treatment process just as a customer does. The goal is to see the agency from the customer's perspective. Taking this perspective of treatment services—from the first call for help, to the intake process, and through final discharge is the most useful way to understand how the customer feels, and to discover how to make improvements that will serve the customer better.

For example, everyone has the issue of no-shows. Why is this? How can a walk-through help you understand this issue, and what can you do to improve it?





As you go about making change in your organization, there are a few questions that naturally arise.

- How will you know which changes worked and which did not?
- How will you know which changes resulted in an improvement?
- Which change is the most important, and resulted in the most significant improvement?


By collecting data before, during, and after the change you implement, you can measure, evaluate, and compare your agency's progress toward the goals you set.

We recommend a six-step process:

- Define measures
- Collect baseline data
- Establish a clear aim
- Consistently collect data
- Chart your progress, and
- Ask questions.

### 3. Measuring the effect of Change

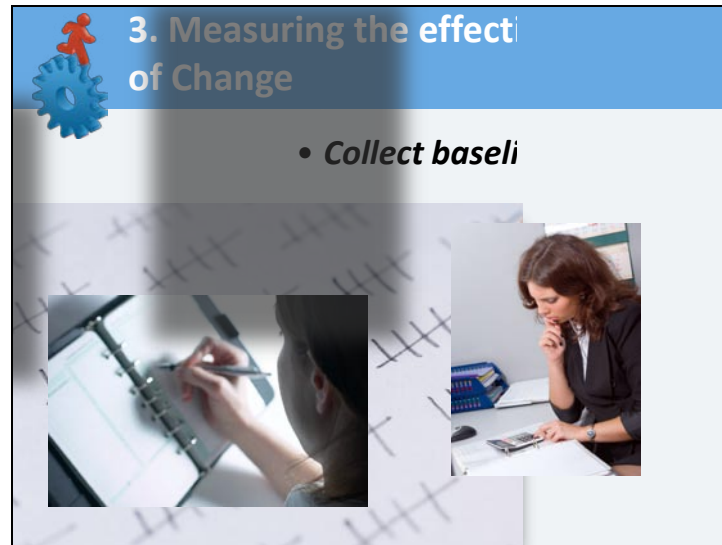
- **Define your i**



The image shows a close-up of a hand holding a pencil, pointing to a document with numerical data and tally marks. The document appears to be a financial or accounting record, with columns of numbers and some text. The background is a light blue gradient with a gear icon and a person icon in the top left corner.

Measuring change is important, and it can be done using simple methods like tally marks on a piece of paper or entering data on Excel spreadsheets.

It is important to define your measures before you start the change process, however – what you measure should clarify the project objectives, and what you are seeking to change. Here's a Tip: Clear definitions are critical to measure change successfully.



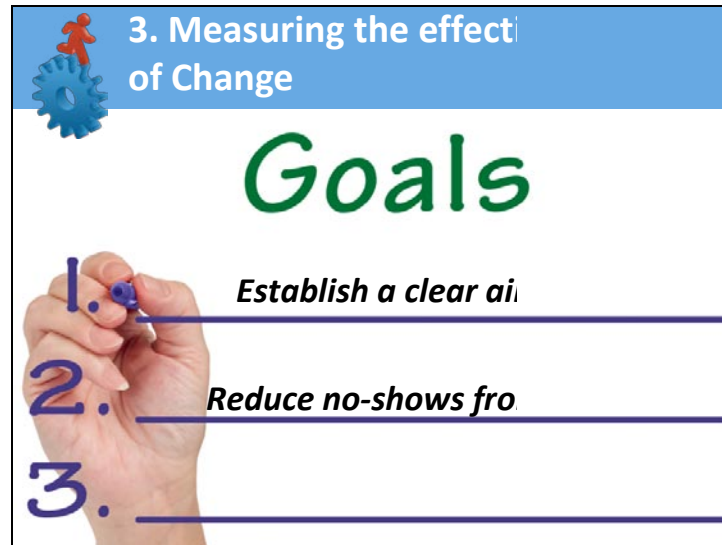
3. Measuring the effect of Change

- *Collect baseline*

The slide features a blue header with a gear icon and a person icon. Below the header, the text '3. Measuring the effect of Change' is displayed in a light blue font. Underneath, a bullet point reads '• *Collect baseline*'. The main content area contains two photographs: one showing a person's hands writing in a notebook, and another showing a woman sitting at a desk, looking thoughtful.

Before you change anything, you should collect some data in advance of the change. This is called “baseline data” and it shows you where you are today. Baseline data allows you to measure the impact of any changes that are made. It also provides a before and after picture of a situation.

Julie, who is aiming to reduce the number of no-shows, needed to know exactly what her no-show rate was before trying to improve it. She simply had the office receptionist record the no-shows to intake appointments by making a tally mark in an extra column in the scheduling book. After recording no-shows for one month, she had enough baseline data to set an improvement goal.



**3. Measuring the effect of Change**

# Goals

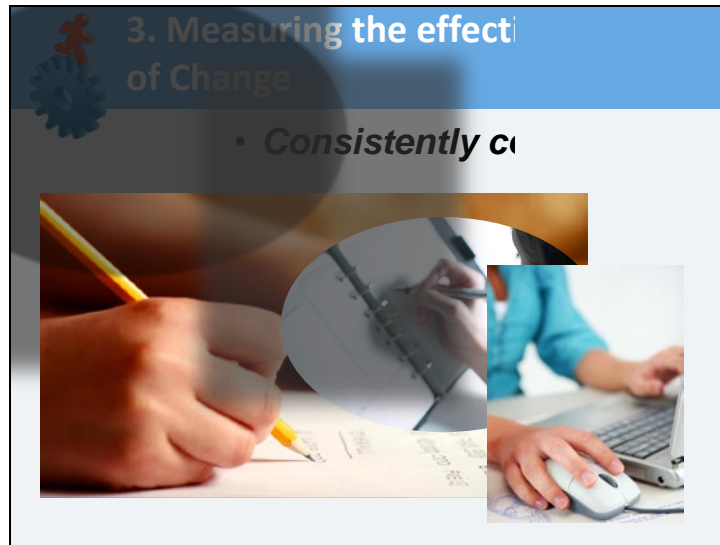
1. *Establish a clear aim*
2. *Reduce no-shows from*
- 3.

It's also important to establish a clear improvement aim - for example, you might seek to reduce client no-shows from 40 percent to 20 percent.

Such a target should be realistic yet ambitious. Remember to be flexible when establishing a goal. Goal can often be too ambitious or not ambitious enough. Set a realistic goal that still challenges your organization to improve.

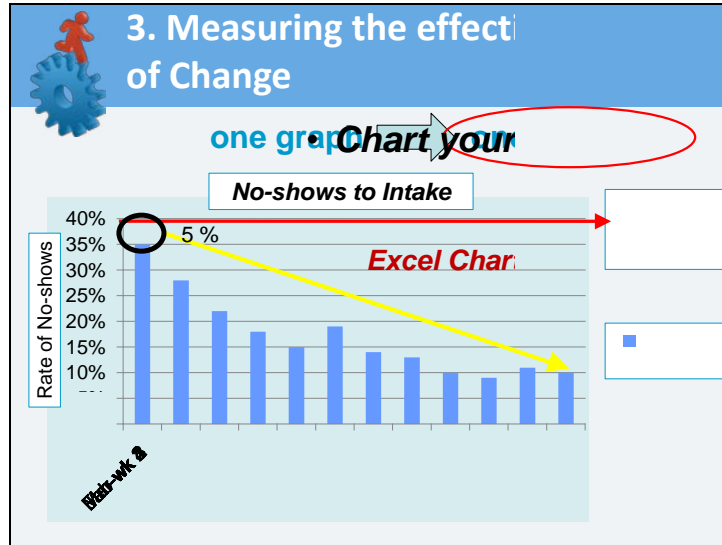
Our CEO Julie wanted to reduce no-shows from a baseline of 40% to 20%. Once this improvement was achieved and sustained, she would set a new goal.





The ability to establish consistent methods for collecting and measuring data on a regular basis is a crucial part of the change process. You may have some methods to track data already in place, but in other cases you may need to manually collect the data.

Julie's receptionist continued to record no-show data daily just using the extra column in the scheduling book. At the end of each week, the receptionist transferred the data to an Excel spreadsheet. Julie would then compare the weekly results with the baseline data.




Over time your agency will collect both pre-change or “baseline” data, as well as post-change data. Share this data with others in your organization. An effective tool for sharing this information is an Excel chart using simple line or bar graphs. These powerful visual aids should follow one simple axiom: one graph, one message.

In this example, you can see that once the change was implemented, an immediate improvement was realized - a 5% reduction in no-shows was achieved in the first week compared to the pre-change baseline.

The chart clearly shows that the no-show rate for this agency was greatly reduced over the three month period and leads one to believe that the change implemented was truly an improvement.

Here’s a tip: Charts are powerful visual aids to communicate ONE message.



### 3. Measuring the effect of Change

- **Ask**
  - What is the information telling me about change in my organization?
  - Make reminder phone calls the day before appointment

Measuring the impact of change does not stop here; in fact, it is only the beginning. The most important step in the process is to ask: What is the information telling me about change in my organization?

If change is successful, the information you have collected may tell you which intervention had the most success in meeting your goal. For example, at Julie's agency, the first change tested to reduce no-shows was to make reminder phone calls the day before a scheduled appointment. The data showed that this simple change resulted in a 5% decrease in no-shows after only one week of testing. Staff members who were not accustomed to using data to verify results were pleasantly surprised to see the quick improvement.

Unsuccessful changes also afford your agency the opportunity to ask "Why?" Another NIATx member attempted making reminder phone calls to reduce no-shows but found that their many homeless clients were not accessible by phone. That agency then tested a second change which was walk-in appointments. This change was more successful in improving access for the homeless population.

Measuring the impact of change is an important aspect of successful organizational improvement. These six steps are designed to help your agency in the timely and accurate measurement of change.



## 4. Select and Test Change

Promising Practices for the


- Reduce
- Reduce
- Increase
- Increase

The next step is to choose specific changes and test them one at a time in your environment.

NIATx has catalogued **promising practices** associated with each of the four aims. These promising practices are solutions that have worked for other NIATx organizations. Though there is no guarantee that they will work for your situation, they should at least provide inspiration for ideas you may want to try.

**4. Select and Test Changes**

**Promising Practices for Reducing No-Shows**



Address barriers to attending appointments

Clearly explain to expectants what to expect

Motivate and communicate

Returning to our example of reducing no-shows -- here are some promising practices we've found that can help:

1. Address barriers that your client faces in attending assessments.
2. Clearly explain to your client what they can expect at the appointment.
3. Use motivational interviewing techniques when communicating with the client.
4. Get the client to the first appointment quickly, and
5. Make reminder phone calls to clients.

The benefit of using one of the promising practices that we have documented is that they have already been field tested by your peers. However, do not limit your team to our list. One of the tricks in this step is to be creative in the types of changes you consider testing.

Some other ideas to consider....

- Talk to your coworkers who deal with the process that needs improvement; ask them what recommendations they have, brainstorm ideas.
- Network with other organizations both inside and outside your field. For example, any business that works through appointments has to deal with no-shows. You might find good ideas in any physician's office, legal office, or even at the beauty shop.

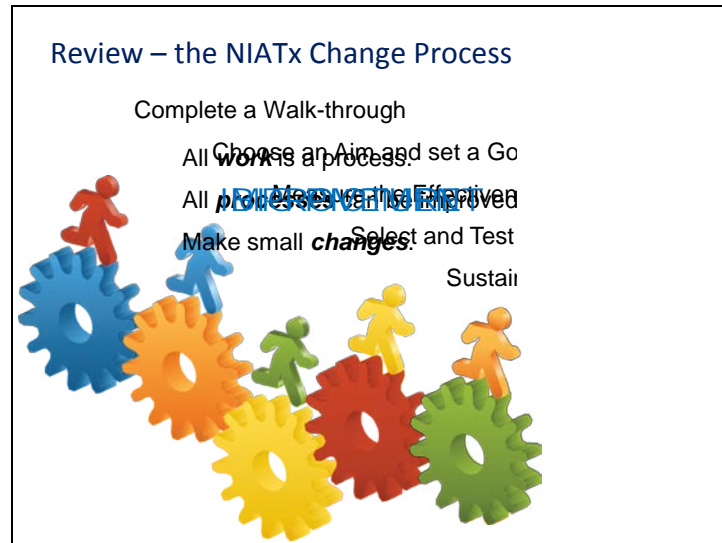


The focus here shifts to making sure the improvement changes are sustained over the long haul. The secret of sustaining changes is to make it as easy as possible for people to use the new methods, and make it very difficult to revert to old ways of doing business.

You will need to work with other staff in your organization to complete this step. Sustaining a successful change requires commitment from all levels of the organization, from top management to front-line staff. Everyone needs to support the change to make it become part of your organization's way of doing business.

Be sure to celebrate your success!

Find ways to help celebrate your success in making an improvement. Publicize the results in an employee newsletter, for instance, or hold a pizza party or informal breakfast with all staff to describe the change and share the results.. These kinds of public celebrations will not only help your team bring its work to a close, but also educate others about the value of improvement (and, hopefully, encourage them to participate in the future).



Okay, let's do a quick review. In this section, you learned more about the big picture, and how everything works together to support changes that make a difference.

Remember that all work is a process – and you can improve any process by making small changes.

All *processes* have inputs, steps, and outcomes, for which data can be collected, measurements can be made, and changes can be developed and tested to lead to improvement.

You start with a walk-through, then choose an aim, and set a goal. You need to collect baseline data, measure the effectiveness of change, and select and test changes. Finally, it's important to sustain the gains you have made.

Now take a moment to complete the following quick quiz.

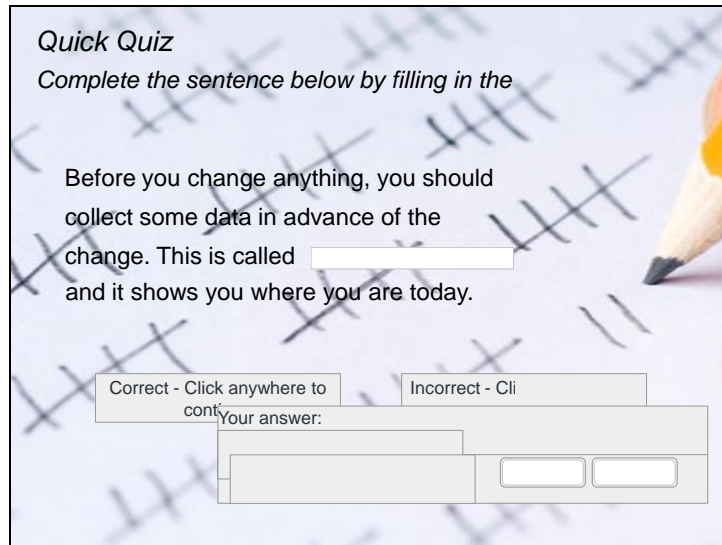


**Quick Quiz**  
Complete the sentence below by filling in the

Before you change anything, you should collect some data in advance of the change. This is called  and it shows you where you are today.

Correct - Click anywhere to continue  Incorrect - Cli

Your answer:



*See what you remember*  
*Drag and drop each statement from the list on the right step in the NIATx process.*

**Steps in the NIATx process**

- 1 The walk-through
- 2 Choose an aim and set a goal
- 3 Measuring change
- 4 Select and test change
- 5 Sustain the gains

**Match to the correct**

1. Experience the treatment customer does.
2. The aim that you choose upon the insights you gain.
3. Collect data before, during and after the change.
4. Promising practices prove themselves.
5. Make it as easy as possible for the customer to try.

The diagram consists of a box labeled 'You' at the top right. An arrow points from 'You' to a box labeled 'C'. Below 'C' is a box labeled 'A'. Below 'A' are several empty boxes and arrows, suggesting a process flow for matching the statements to the steps.

# Feedback


Question Feedback/Review Information Will  
Appear Here



Now take a minute and reflect....

Think about the ways your organization collects data. Do you use the data to examine your processes?



*Next steps*

Continue to  
**The Walk-through**



The slide features a blue header with the NIATx logo, which consists of a circular icon with three curved segments and the text 'NIATx' with a lightning bolt symbol. The main content area has a light blue background with a large, faint circular graphic. The text 'Next steps' is in orange italics, and 'Continue to The Walk-through' is in black. A small black footprint icon is located on the right side of the slide.

*NIATx* would like to recognize  
**Robert Wood Johnson Found**  
for their financial support in making  
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Thank you.