

My Top 3 Lessons Learned

"Fall Down Seven, Get up Eight"
Insights gained from two decades of experimenting with Lean.

Isaac B. Mitchell



Be okay with failure and learn from it.



"Fall down seven times, get up eight."





Lesson One: Focus on the patient. Everything else will follow.



Meet Tye





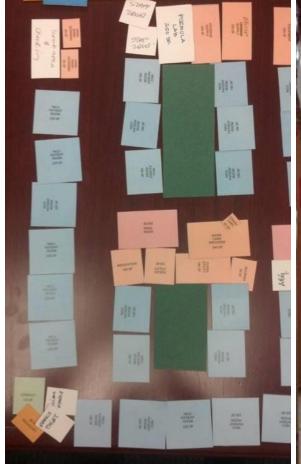
East Tennessee Children's Hospital from Concept to Creation







"We have to travel to 5 floors & walk 3 blocks for surgery."











"They kept asking us the same question over and over..."



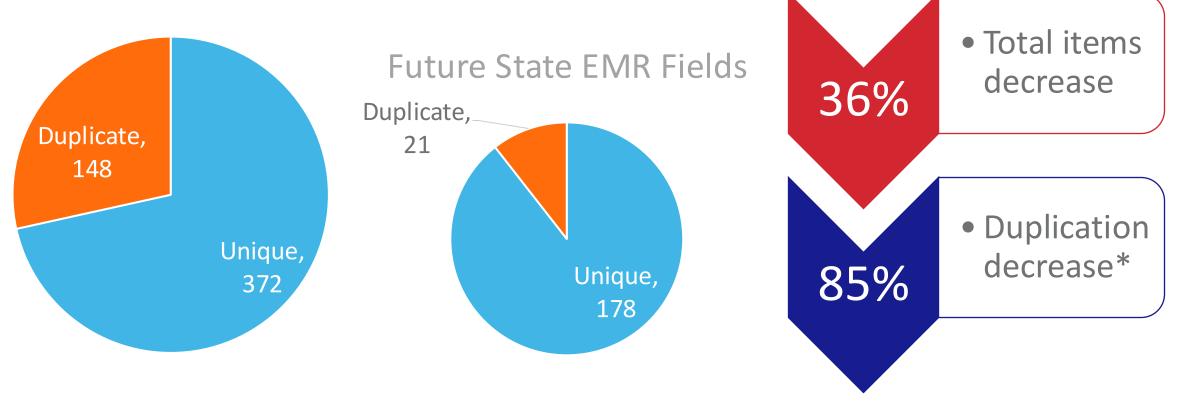
possible questions being asked of patients/families prior to surgery



Inpatient vs. Outpatient System Design

Seek to understand, not judge.

Current State EMR Fields



*Purposeful duplication of items that benefit from verification

"Some patients were having a great experience, but we were not."

Date: Tuesday, February 25, 2014

Time: 12:30 Cases: 58

EGD

Wait P-54

EGD

P-55

EGD

Notes:

Utilization							
Reg.	P/P	PACU	Pro.	OR			
33%	43%	67%	50%	22%			

Procedure Pre/Post

Surgical Pre/Post (West)

Surgical	Pre/Post	(East)
----------	----------	--------

							,		,	, .		
P/P 1	P/P 2	P/P 9	P/P 10	P/P 17	P/P 19	P/P 21	P/P 23	P/P 33	P/P 35	P/P 37	P/P 39	
P-52			P-48					P-20	P-13	P-28	P-22	l
EGD			EGD					Eye	Eye	Eye	Gen	l
P/P 3	P/P 4	P/P 11	P/P 12	P/P 18	P/P 20	P/P 22	P/P 24	P/P 34	P/P 36	P/P 38	P/P 40	l
				P-47							P-21	l
				URO							Ortho	l
P/P 5	P/P 6	P/P 13	P/P 14	P/P 25	P/P 27	P/P 29	P/P 31	PACU 3	PACU 4	PACU 5	PACU 6	Ī
P-46	P-49			P-35			P-38	P-27	P-30	P-33	P-37	ſ
EGD	EGD			ENT			Tubes	T&A	Gen	Ortho	Eye	ĺ
P/P 7	P/P 8	P/P 15	P/P 16	P/P 26	P/P 28	P/P 30	P/P 32	PACU 2	PACU 1		PACU 9	
P-50	P-56	P-53			P-36		P-34	P-26	P-25			ſ
FGD	FGD	FGD			ENT		ENT	Dent	Dent			Ī

				P-20	P-13	P-28	P-22	
				Eye	Eye	Eye	Gen	
18	P/P 20	P/P 22	P/P 24	P/P 34	P/P 36	P/P 38	P/P 40	
47							P-21	
RO							Ortho	
25	P/P 27	P/P 29	P/P 31	PACU 3	PACU 4	PACU 5	PACU 6	P#
35			P-38	P-27	P-30	P-33	P-37	
ΝT			Tubes	T&A	Gen	Ortho	Eye	
26	P/P 28	P/P 30	P/P 32	PACU 2	PACU 1		PACU 9	P#
	P-36		P-34	P-26	P-25			
	FNT		FNT	Dent	Dent			

Procedure ORs

Surgical	ORs ((West))
----------	-------	--------	---

Pro. 1	Pro. 2	Pro. 3	Pro. 4
P-42			P-40
Dent			Dent

	Dent			Dent
	Wa	iting Rooi	m Occupa	ncy
	2 Fam.	3 Fam.	4 Fam.	5 Fam.
	29	59	89	119

Juigic	Juigical Ons (West)							
OR 2	OR 3	OR 4						
	P-29							
	T&A							
OR 1		OR 5						

Surgical ORs (East)

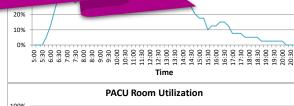
0		,
OR 7	OR 8	OR 9
P-44		
Ortho		
OR 6		Future OR

Use your wits, not your wallet.

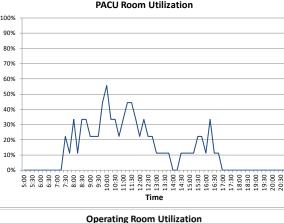
F.		/	
-		-31	
суе	Gen	EGD	
P-2	P-17	P-32	
Bronch	EGD	ENT	
P-3	P-18	2.41	
T&A	Dent		
P-4	P-19		
Tubes	T&A		
P-5			
Ortho			
P-6			
Tubes			MRI
P-7			
T&A			
P-8	P-23		
Eye	T&A		
P-9	P-24	P-39	
T&A	EGD	EGD	
P-10			
EGD			
P-11			
T&A			
P-12			
T&A			
		P-43	
		EGD	
P-14			
ENT			
P-15			
T&A		MRI	

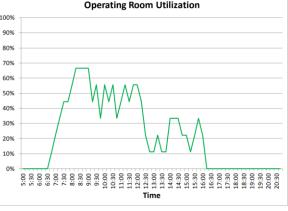
ACU 7

ACU 8



Pre/Post Room Utilization







"The staff are doing their best with the resources they have. They're stressed!"

Home > LeanMgmt > OrSt	affingPredict	tor									
Surgery Date	7/15/2015				Case	Types		Allergy,	Anesthesi	ia, g	
Registration Patient/Staff	1				Nurse	Pre Patie	ent/Staff	8			
PCA Pre Patient/Staff	10				OR No	urse Patie	nt/Staff	1			
OR Tech Patient/Staff	Tech Patient/Staff 1				RECOVERY Patient/Staff 1						
Nurse Post Patient/Staff	8				Pca P	ost Patier	t/Staff	10			
Include Inpatient	No		•								
4	▶ 100	1%	~		Find	Next	4 • @				
Registration Staff		1	1	1	2	3	1	0	0	0	0
Nurse Pre		2	2	1	1	1	1	1	1	1	1
Pca Pre		2	1	1	1	1	1	1	1	1	1
OR Nurse		6	8	6	7	7	5	7	6	5	4
OR Tech		6	8	6	7	7	5	7	6	5	4
Recovery Nurse		5	4	5	5	2	3	4	4	4	3
Nurse Post		2	2	2	2	3	2	2	2	2	2
Pca Post		1	2	2	2	2	2	2	2	2	2

ľ	Date		Fi	iday	(0-30-17			Employee	Shift
l		PrePost	PACU	ENDO		PrePost	PACU	ENDO	C.L. Casha	
ŀ	7				130				C.L. Ashley	
	730		(1	1	2				Melissa	5-1230
	8								· Tracie	6-430
				10	r				·Alena	6-430
ď	v/iˈ	tv/	O	16					EQ-Nicki	6-430
J	VI	٠,							· Carol	6-230
		it/	٦l						·Alicia	645715
(JIC	ty oit(יוג						· Joyce	6-630
ì		_							* Karen	645715
	1130		111		6				· Whitney	645715
	12		11	1	630				· CX Pam	7-3
	1230			1	7				· Sherri	7-1
	1		1	1					· Dana	7-1
	ZONE	1			Zone	4			Lisa	7-330
									Linda	7-330
	-								· CX Arny	4324
	Zone	2			Zone	5				
							_	-	Nikki 51	PCA
	Zone	3			Zone	6 Uhit			Denise7-3	PCA
					9	inerri				PCA
	тота					isa Inda				PCA
	ENDO	-			L	ITIGA				PCA
	PICU								QL.	PCA
	FICO								Sharon	HUC

Creat





What our patients experience today.

62% ↓

• Reduction in pre-op questions

84% |

• Reduced average time to get a patient ready for surgery from 287 minutes to 47 minutes

90%



• Patients experience our pre-op goal of 60 minutes

18% \

• Reduction of Operating Room turnover time

\$560K ↓

• Reduction in new facility equipment needs

\$812K ↓

• Cost avoidance of two fewer planned ORs while still meeting patient demand.

\$3.2M \

 Overhead cost reduced by running the same volume through 6 ORs vs 9 ORs.

"We're now only collecting essential information from our patients and families. I now have time to build relationships with my patients. This is why I went into nursing."



"I called my husband on the day of surgery and couldn't believe the improvements made in the reduction of repetitive questions and the improvement of staff working in tandem. It was a night and day difference."





Building an improvement culture starts with the frontline.



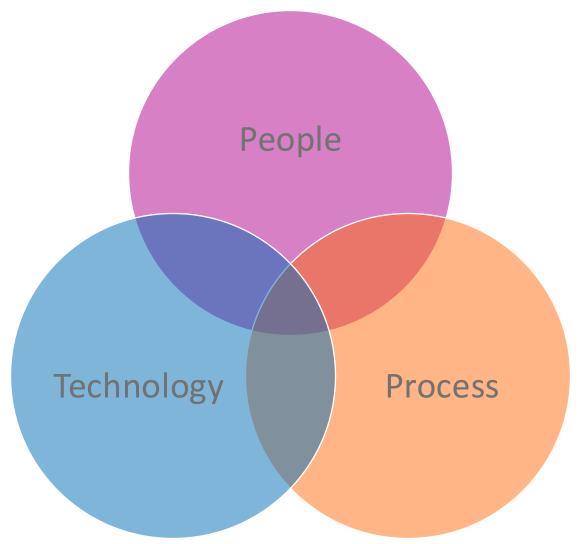


Lesson Two:

Technology is not a silver bullet solution in healthcare.

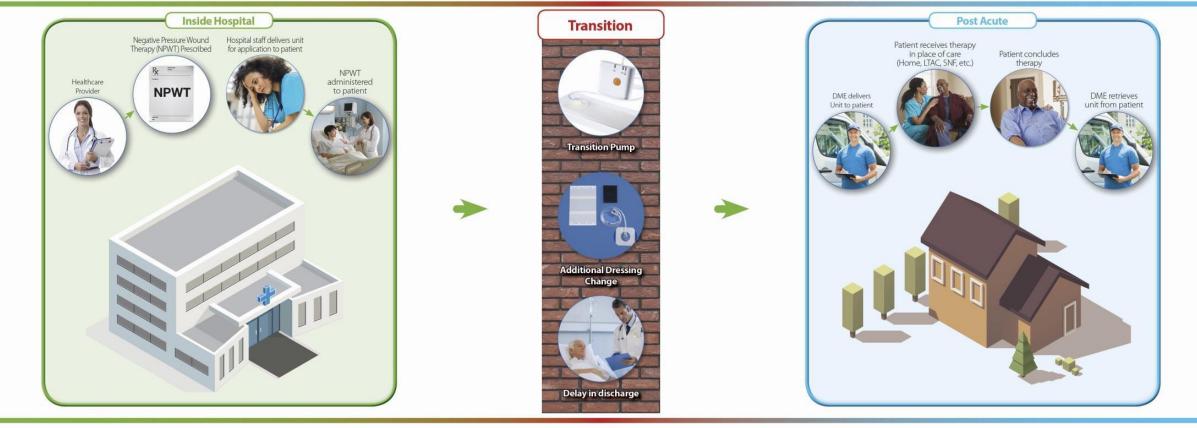


Design with Lean Principles: Improving one without the other is not improvement.





Go to Gemba. Seek to Understand.



Hospital – 1st Pump

- \$50-125 per day per pump
- Lost pumps
- Inconsistent billing

Transition – 2nd pump

- Transition Pump (\$600-900)
- Additional dressing change
- Delay in Discharge (\$800-5000 per night)
 - 3 hrs 3 days

Post Acute – 3rd pump

• Device Change







KFF Health News

PUBLIC HEALTH

RACE & HEALTH

INVESTIGATIONS ~

Health Care's 'Dirty Little Secret': No One **May Be Coordinating Care**

By Roni Caryn Rabin

□ REPUBLISH THIS STORY

This KHN story was produced in collaboration with The Washington Post

"Nobody is responsible for coordinating care...that's the dirty little secret about health care."

Betsy Gabay saw a rotating cast of at least 14 doctors when she was hospitalized at New York Hospital Queens for almost four weeks last year for a flare-up of ulcerative colitis. But the person she credits with saving her life is a spry, persistent 75-year-old with a vested interest — her mother.



Illustration by Arthur Giron

Alarmed by her daughter's rapid deterioration and then by her abrupt discharge from the hospital, Gabay's mother contacted a physician friend who got her daughter admitted to Mount Sinai Medical Center in Manhattan.



Systems Thinking: The ability to see how one thing is part of a larger, connected system.

Deming's System of Profound Knowledge



Theory of Knowledge: How do we know what we believe we know?



Theory of Variation: How do we analyze and understand what we know?



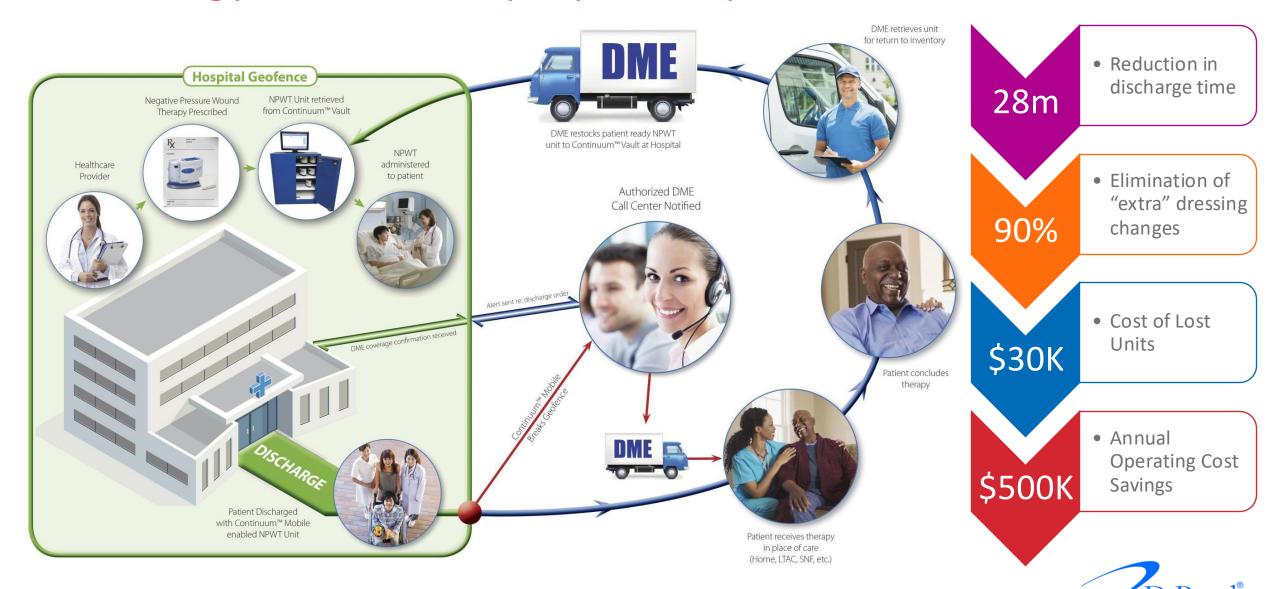
Theory of Psychology: How do we account for human behavior



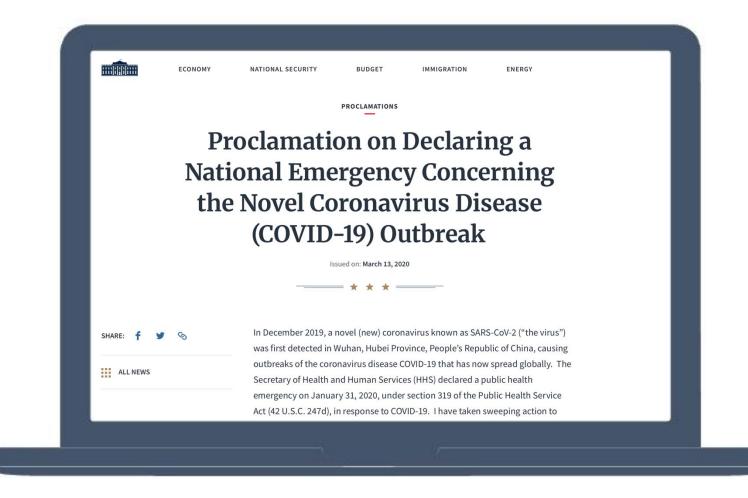
An Appreciation of Systems/ Systems Thinking: Are we seeing the bigger picture?



Technology built around people and process.

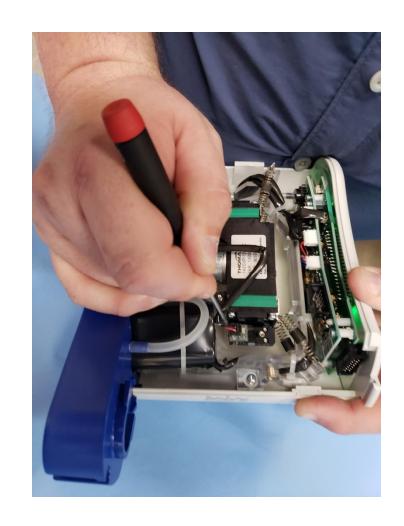


The world changed overnight, and so did we.





Sunk Cost Fallacy: Focus on the right problem to solve.



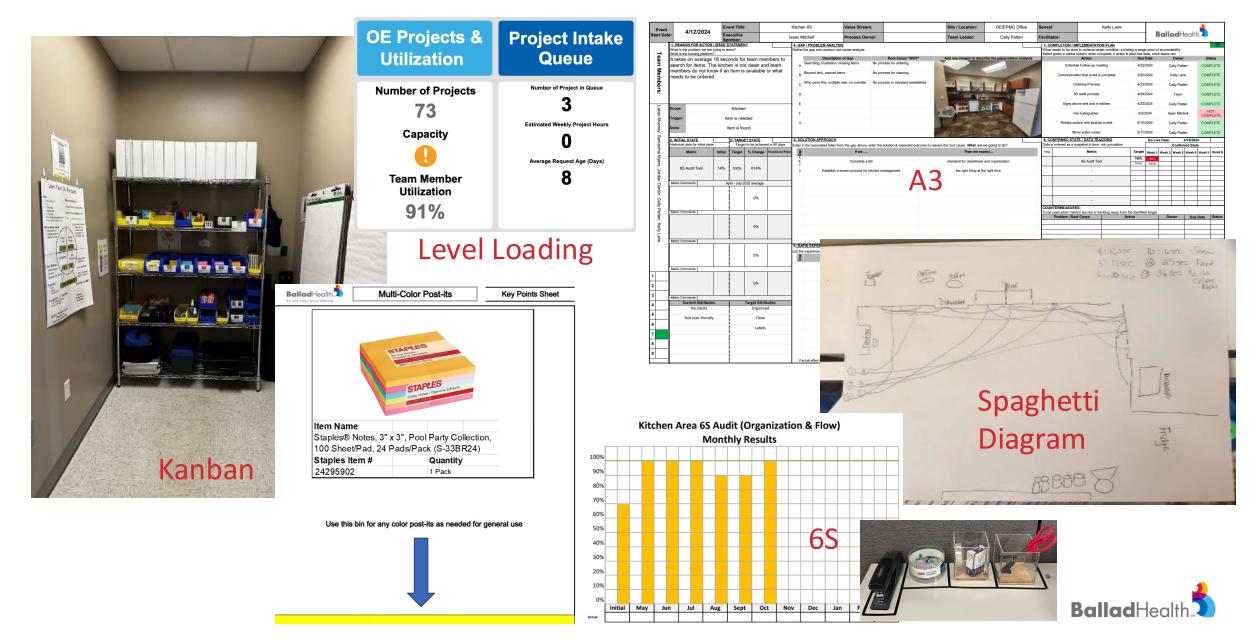




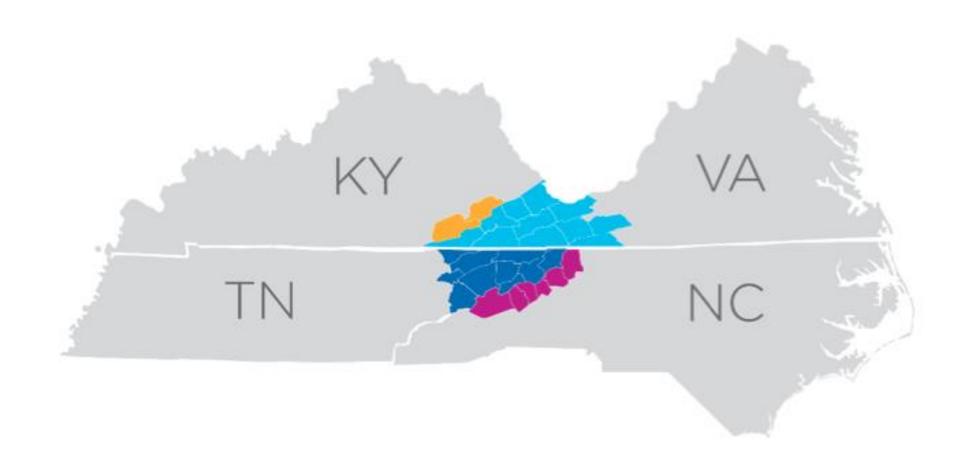
Lesson Three: Visual Management: Avoid "rules for thee, not for me". Practice what you preach!



What are some Lean Visual Management Tools and Examples?



Ballad Health





Visual Management Best Practice

1 second

- Are we winning or losing?
- What's the score?

3 second

- What's happening?
- How are we trending?

10 second

- Next Steps?
- What are the drivers of the problem?
- What are we doing to fix the problem?



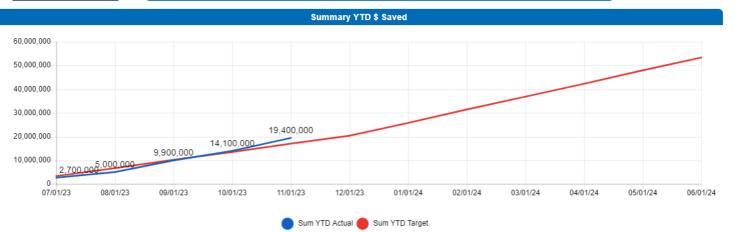
Level One: Executive



Corporate Visual Dashboard

Overall Strategy Performance

Total Status



Work Streams White Pages **Golden Ticket Scranton Merger** Saber Pyramid YTD Status YTD Status YTD Status YTD Status As of 09/01/23 As of 11/01/23 As of 11/01/23 As of 11/01/23 YTD Actual 0 YTD Actual 6,200,000 YTD Actual 9,400,000 YTD Actual 3,800,000 YTD Target YTD Target YTD Target YTD Target 7.000.000 6.000.000 4,000,000 **Barriers Barriers** Choosing **Barriers Barriers** Need's Andy's signature. between Updates Updates Michael Scott Need staff to fill Scranton or has placed in as "Viral" fans. Updates We finally closed Stamford Golden Tickets "The Whale" of in the shipments Updates Final list of staff paper sales! for random relocation customers to determined. receive a discound **Executive Sponsor** Michael Scott **Executive Sponsor** David Wallace **Executive Sponsor Executive Sponsor Andy Bernard** Ryan Howard **Program Manager Dwight Schrute** Program Manager Robert California Program Manager Gabe Lewis Dwight Schrute



Level Two: Management and Business Owner



Sabre Pyramid Project Dashboard

Click Here for Project Management Details

KPI Status

YTD Status

YTD Actual

YTD Target

is

9,400,000 7,000,000

Barriers and Updates

Barriers

Updates

Need staff to fill in as "Viral" fans.

Project Leadership

Executive Sponsor Program Manager

Business Owner

David Wallace Robert California Dwight Schrute

Lag Measures



Lead Measures





Level Three:

Project Team and Front-line



Primary Project Information Project Name Stakeholders Project Information Project Health

Stakeholders	Project Information
EPMO Project Manager	Rober California
Business Owner	Dwight Schrute
Executive Sponsor	David Wallace
Expected Start Date	1/1/2023
Expected End Date	11/30/2023
Go - Live	12/1/2023



Project Status

23% % Complete

Project Progress Report	
Focus Area	% Complete
1) Initiate	100%
Project Kick-Off	100%
Charter Sign-Off	100%
2) Plan	88%
3) Execute	10%
Project Specific Milestone 1	25%
Project Specific Milestone 2	50%

Go Live

Objectives & Key	Results
OKRs	Project Information
Objective	Launch Sabre Pyramid by Q3 2023
Key Results	KR1: Create a Social Media Plan to target 3000 influencers by Q4 2023 KR2: Manufacture 20,000 units for Q3 Product Launch. KR3: Train technical sales force and create quota by Q1 2023

At Risk Report			
Task Name	Assigned To	Project Status	At Risk
Marketing Campaign to Avoid Sabre Fire Ne	Toby Flenderson		•

Action Items			
Primary	Assigned To	Due Date	Status
Complete Technical Spec Report	Gabe Lewis	10/24/23	In Progress
Viral Blogger Costumes	Erin Hannon	11/02/23	In Progress

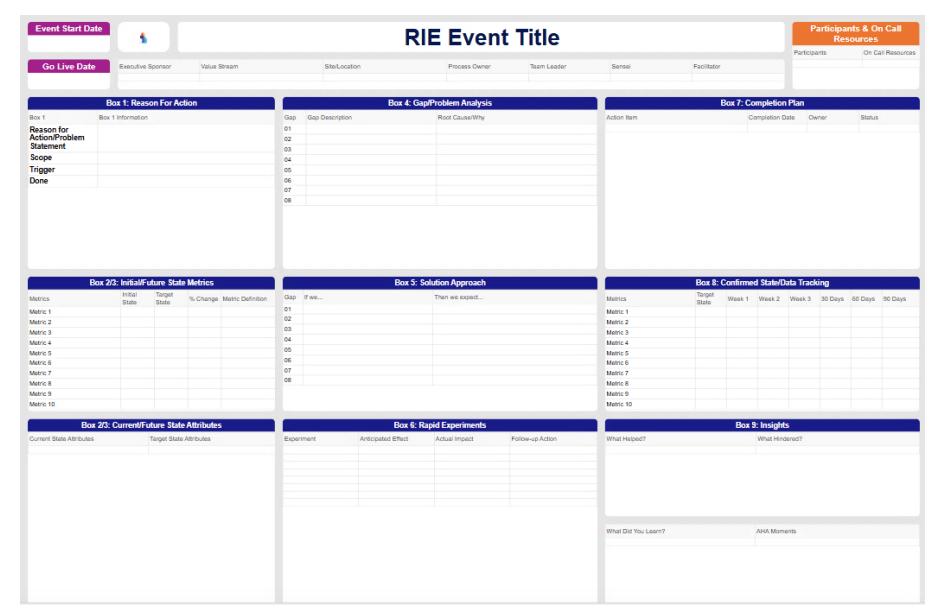
Project Documents			
Primary	Date Released	Version	Release Status
Project/Program Charter	10/02/23	1.3	•
Sales Strategy	07/16/23	3.7	•

Meeting Minutes	
Document Name	Meeting Date
Status Meeting	07/03/23
Status Meeting	07/17/23



Level Four:

A3





Advocate and market your team!



Ballad Health EPMO Uses Smartsheet Modern PPM to Integrate 20 Hospitals

Ballad Health uses Smartsheet Modern Project and Portfolio Management (PPM) to automate the management of up to 150 projects, save more than 3,000 hours yearly, improve communication between 20 hospitals, and free up more time for analyzing population health data for improved patient outcomes.

Avg. read time: 7 min **f** X **in** Ø









yearly through automated processes

more projects managed by team members



EPMO/OE ROI Tracker

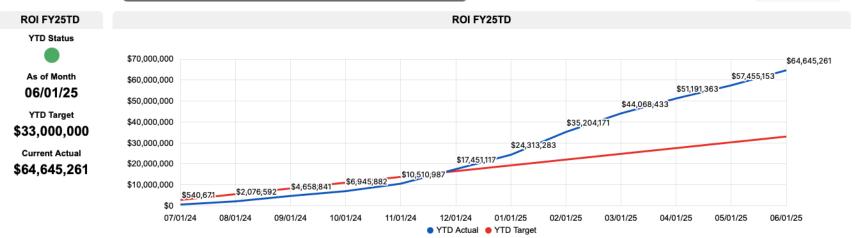
FY25 ROI Stats

ROI per FTE per FY \$2,085,331

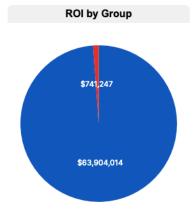
Return Rate on Budget 19.3

Return Rate on Salary 25.5





ROI Confirmed				
Primary	FY	Quantitative \$ (Hard Dollars)	Source File Location	Group
BHMA Subsidies Reduction	2025			
BHMA Hospitalist Services Improvement	2025	-\$1,078,365.89	Performance Improvement Tracker FY25	EPM
CDI Clinical Documentation Improvement	2025	-\$1,796,403.00	Financial Revenue Opportunity Tracker FY25	EPM
Revenue Plan Revenue Lift	2025	\$66,778,783.00	Financial Revenue Opportunity Tracker FY25	EPM
JMH AMA Reduction	2025	\$152,586.00	OE - JMH AMA Reduction	OE
Charge Capture	2025			OE
BHMA Subsidies - Lease Savings	2025	\$204,702.00	BHMA Lag Data Sheet non-FO	OE
BRMC Inventory Reductions	2025	\$383,959.00	EOY Ledger Adjustment - attached	OE





Hurricane Helene – Aligning Resources to Demand





Real Time Project Status

Ballad Health EPMO/OE/INVT Project Intake **Status Report**



EPMO/OE/INVT Project Intake Status Submitted for Review Assigned



EPMO/OE/INVT Project Queue **Stats**

Number of Project in Queue

Average Request Age (Days)

Estimated Weekly Project Hours

20

EPMO/OE/INVT Project Intake Complete Requestor/Business Owner Intake Status Progress Notes Created 04/03/25 12:29 PM Standardization of Patient Weight Displays in Epic 08/01/25 8:00 AM BRMC Dialysis Expansion Rejected Submitted for Review 08/13/25 1:09 PM **Business Continuity** 08/18/25 7:17 AM BRMC ED VSA Assigned 08/21/25 6:45 AM Diabetes Treatment Center VSA Assigned CLABSI Steering Committee Submitted for Review 08/27/25 7:42 AM 08/27/25 11:58 AM

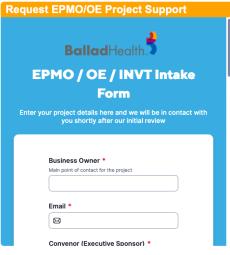
Project Status Dashboards

(3)

OE Project Status Dashboard

EPMO Project Status Dashboard

Innovation Project Status Dashboard



OE Projects & Utilization

Queue

Number of Projects

73

Capacity



Team Member Utilization

89%

Project Intake

Number of Project in Queue

Estimated Weekly Project Hours

20

Average Request Age (Days)

Recommended Additions

Project Requestor/Business Owner Intake Score Estimated OE Hou

Recommended Closures

Project Name	Team Member
4DX Deployment	Jordan Durbin

OE Team Member Projects and Utilization

Isaac Mitchell, Vice

Team Member Utilization

107%

Capacity

8

Number of Projects

Director

Capacity

Team Member Utilization

84%

Tim Trent, System

Number of Active Projects

Kara Murray, Engineer/Sensei

Team Member Utilization

74%

Capacity

Number of Active Projects

Ed Greene, Market

Engineer/Sensei

Team Member Utilization 56%

Capacity

Number of Active Projects

Sandi Wilson, Northern Market Leader Team Member Utilization

93%

Capacity

Number of Active Projects

Team Member Utilization

95%

Randi Goodman.

98% Capacity

Team Member Utilization

Sam Werdel, Market

_eader (Ensemble)

Number of Active Projects

Ashley Lindholm. Northern Market Leader

Team Member Utilization

66%

Capacity

Number of Active Projects

Jordan Durbin.

Team Member Utilization

93%

Capacity

Number of Active Projects

Austin Mittan, Market

Team Member Utilization

78%

Number of Active Projects

Capacity

Janette Johnson. Specialist HVMC

> Team Member Utilization 92%

> > Capacity

Number of Active Projects

93% Capacity

Team Member Utilization

Number of Active Projects

Brandon Johnson,

Team Member Utilization 90%

Caity Patten, Southern

Team Member Utilization 83%

> Capacity

Number of Active Projects

Capacity

Number of Active Projects

Open Position. Coordinator

Team Member Utilization 0%

Capacity

Number of Active Projects

0

Raychel Stankov, Intern Open Internship

Capacity

Number of Active Projects

Capacity

Team Member Utilization

Open Position.

Capacity

Number of Active Projects

Team Member Utilization

Capacity

0%

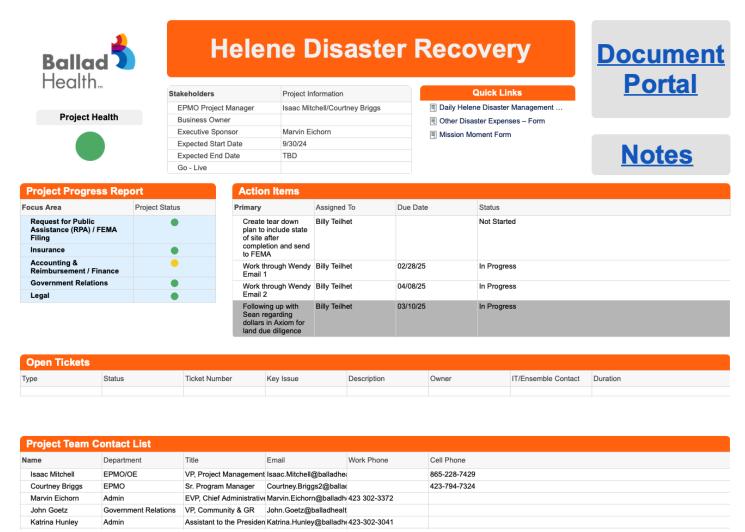
0

Number of Active Projects

Team Member Utilization

Number of Active Project

Transparency drives trust, accountability, and collaboration.





Hurricane Helene Disaster Relief

In the wake of Hurricane Helene's devastation, Ballad Health is focused on relief efforts throughout the Appalachian Highlands.

Donations for disaster relief

Looking for ways to assist people in our community affected by Hurricane Helene? Any donations, whether through actions, resources or monetary contributions, are a great way to get involved.

- Donate supplies
- Donate blood





FEMA Funding and Recovering



Daily Helene Disaster Management & Recovery Administrative Hours Tracking Form - Copy

This form tracks administrative hours spent to support Helene's disaster management and recovery support. It should be completed daily.

Does this entry contain meetings that EPMO is in attendance? *

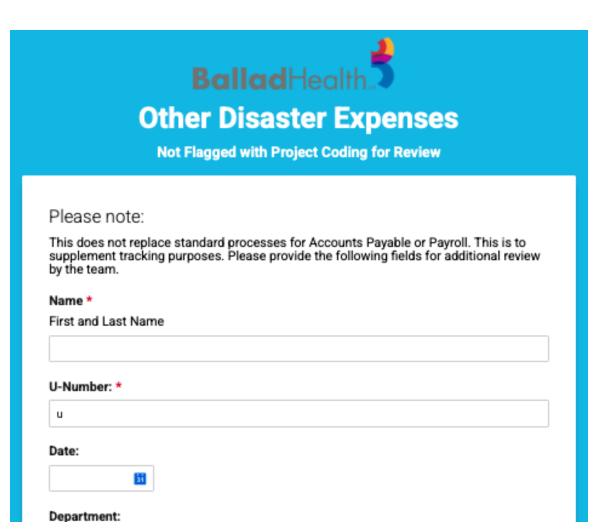
Project Management leads:

- Terri Hamby-Hager (Unicoi)
- Courtney Briggs (Recovery Workgroup / FEMA / Insurance)
- Tasha Kyker (IV Fluids)
- · Mary Hobson (Behavioral Health)

No ▼

First and Last No.

First and Last Name





The Power of Team and Mission



















Celebrating our team and mission.



HRO Mission Moment Collection

Misson Moments at Ballad

64

Mission Moment Database ල

Download Excel ...

Mission Moment Re	eport					
) State the Lesson of he story.	2) Share the message.	3) Return to the Lesson for Emphasis.	What location did the Mission Moment happen?	Which Ballad Health values does this encompass?	Which Leader Skill was utilized?	Which Universal S utilized?
Taking small ideas to create large opportunities to provide for our patients and communities.	A fellow team member requested to recognize Linda Rasnake for going above and beyond for our patients. Linda is a patient service representative at Emory Internal Medicine. During huddle about a year ago, we were discussing the community that we serve. Our team was able to identify many needs within our community and everyone expressed an interest in meeting those needs. Linda took this conversation and turned it into a huge blessing for our community. She made a bulletin board and asked our team members to post ideas. Each month, Linda takes one of those ideas and puts it into action. For the year of 2024, our small office has collected food for a food drive, collected socks for Socktober, adopted a teacher at a local school and stocked her classroom, delivered a Thanksgiving meal to one of our patients who is a widow, and collected coats and blankets for the homeless. Linda also developed a "blessings corner" at our office. This area at our office includes bags with a recipe on the outside of the bag. Inside the bag are the needed ingredients for that meal. Patients can take these bags anonymously, supplying a meal for their family. Since starting this blessings corner, we have had to restock it many times. Although all of the staff at Emory Internal Medicine give to these activities, Linda organizes them, collects the items, and delivers. Linda has expressed a tremendous caring attitude for the community we serve. She also demonstrates respect for our patients, regardless of the socioeconomic status.	Work together as a team regardless of how small to create a large impact.	Ballad Health Medical Associates	Creativity Caring Respect Faith	Huddles	Empathy
I would like to share a message about the importance of compassion and teamwork.	DeAndra is the first person to help when things get busy, most of the time without even asking if you need it. She just sees something that needs to be done and does it. This means so much on those crazy days when you aren't sure how you're going to get the work done.	And that is why it's important that team members work together to provide the best possible care.	Bristol Regional Medical Center	Respect Quality	N/A	N/A
Compassion and teamwork go a long way	Today, a patient who was in the custody of Washington County sheriffs managed to leave his room and make a break for it. Immediately, everyone who had the ability (from the floor it started on): CNAs, students, nurses, security, house supervisor - all joined together and stood at the parking garage, joined up in teams, and searched the hospital to ensure everyone remained safe. Everyone worked quickly and diligently. Toward the end, Brian, our NP in trauma, gained control and held onto the patient until help arrived. When everything was said and done, and the patient was escorted out and everyone returned to their unit (6200/6300), Davis Greene, COO, made a point to come and check on everyone who was involved. To make sure everyone physically, as well as emotionally, was okay, and to see if they needed any assistance. This compassion that he had meant SO much, because it's not	We hire individuals with natural empathy and compassion for others. That is not something that can be taught, and everyone involved today showed that. What Davis Greene did today is something that should be practiced by all		Caring Respect	N/A	Empathy Active Listening Clear Communical Speak up for safet

Mission Moment Fact Sheet

Start Every Meeting with a Mission Moment

We will demonstrate our commitment to our Mission by making our Ballad Values the first agenda item in every meeting and huddle.

Storytelling is simply one of the most powerful ways to make a connection with another person. A good story will put you in the protagonist's shoes. feeling what they feel. This emotional connection makes the lessons learned longer lasting, because in a way you have lived through the event yourself.

There is science behind this. Researchers found that when they observed two people through a brain scanner, a storyteller and a listener, the listener's brain waves would start to match the storyteller's as they listened to the story. This connection is called neural coupling.

Therefore, we will start every meeting with a Ballad Mission Moment. This need only take one to two minutes on the agenda, but it is an outward demonstration of what is most important in our organization.

Mission Moments are a great way to create positive peer accountability for performance improvement. We do this by recognizing and rewarding the strength of our teammates and their commitment to our behavior expectations. We want to create the feeling that these events can happen to any of us and that we have the strength to overcome them. To do so, it is very important to focus on the act itself and not the individual.

What We Do

A Mission Moment is a two-minute statement about the importance of our values. It can come from anywhere:

- · Share your convictions relative to patient safety, team safety and Ballad Health values.
- · Explain how our values contribute to our mission.
- Explain how our policies and practices contribute to safety, quality, and an exceptional patient experience.
- Tell a story about something good that we did.
- ·Tell a story about something bad that happened to us.
- ·Tell a story about harm in another healthcare system.
- ·Tell a story about another healthcare system preventing harm.
- ·Read a safety success story from your people.
- · Read a safety success story from your organization.
- Review a Universal Skills or Universal Reliability.
- · Teach applications of our universal behaviors to our jobs.
- Discuss the importance of reporting problems.
- · Discuss the importance of speaking-up.
- · Ask caregivers to be safe and explain how.
- Thank caregivers for modeling our values.





Hansei: The Power of Self-Reflection



What is the one thing you will start on Monday Morning as a result of our time together?



Daruma Doll Stages

1) Set Your Intention

2) Display with Purpose

3) Celebrate Achievement

4) Honor the Cycle





Golden Opportunities for Authentic Growth

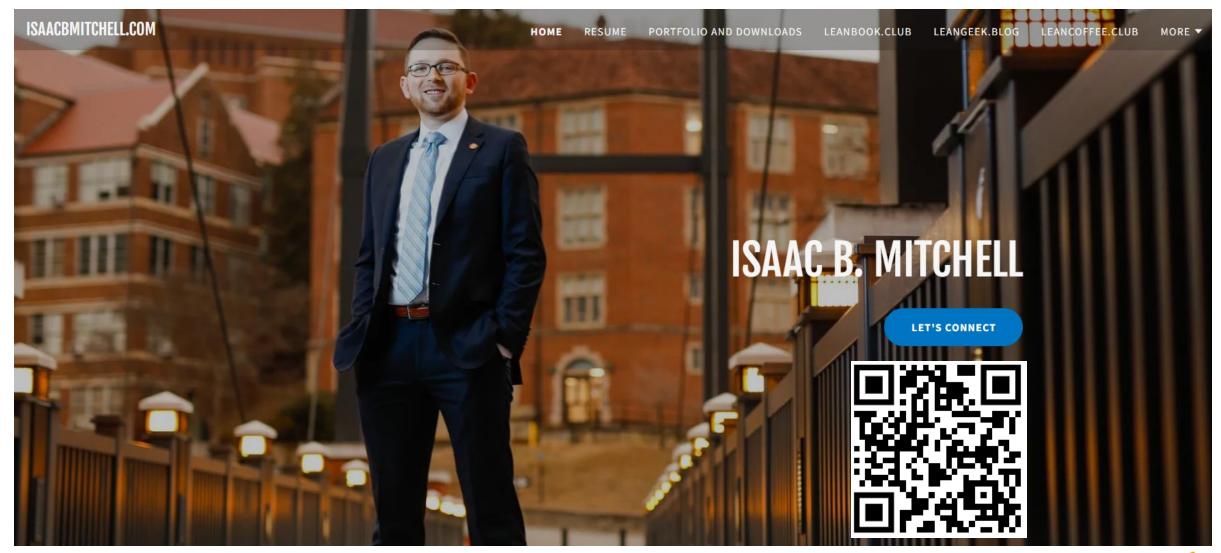
Celebrate imperfections rather than hiding them.

- Kintsugi is the art of repairing broken pottery with gold.
- Wabi-sabi is finding beauty in imperfection and change over time





Questions?





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Isaac B. Mitchell

Isaac.mitchell@balladhealth.org

1-865-228-7429

www.isaacbmitchell.com

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