SCALING LEAN

Empowering 35,000 Problem Solvers with a Small Lean Team

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WE'LL DISCUSS

How OhioHealth's small lean team **implemented** and **sustained** a continuous improvement culture

IN HOPES TO

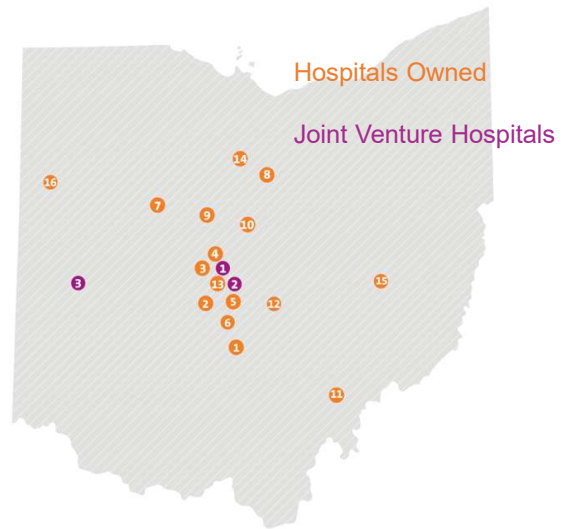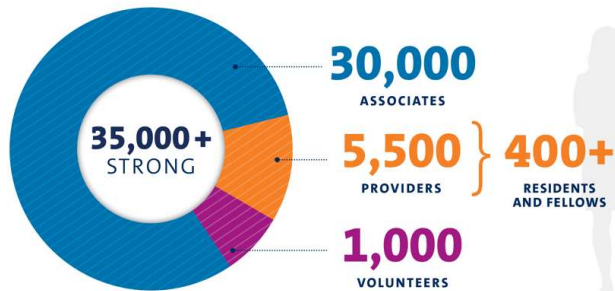Provide **actionable strategies** for implementing and sustaining continuous improvement

&

Challenge your organization to **think differently** about who *really* drives the lean journey

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WHO WE ARE

We are a faith-based, not-for-profit healthcare system.

35,000+ STRONG

30,000 ASSOCIATES

5,500 PROVIDERS } **400+** RESIDENTS AND FELLOWS

1,000 VOLUNTEERS

Hospitals Owned

Joint Venture Hospitals

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"At OhioHealth, our secret sauce is our culture, and our lean management system is an integral part of that culture. **Lean is not just a thing we do – it is who we are**, and it is embedded in our DNA."

Steve Markovich, MD

President and CEO, OhioHealth

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OhioHealth's Lean Journey

OUR LEAN JOURNEY

2005

Process **Excellence** Department Created

2016

Shifted focus to Lean & Became the **Lean Promotion Office**

PROCESS EXCELLENCE

True North: Remove waste from the organization

Team's Primary Responsibility: Act as Project Managers for large cost saving initiatives

Continuous Improvement Approach: Utilize continuous improvement tools as needed

LEAN PROMOTION OFFICE

True North: Shingo Guiding Principles

Team's Primary Responsibility: Develop 35,000 problem solvers

Continuous Improvement Approach: Coach and advise toward organizational progress via a comprehensive management system

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OHIOHEALTH'S MANAGEMENT SYSTEM

The **processes**, **tools**, **structure, and behaviors** we rely on to…

DEFINE SUCCESS

DRIVE PROGRESS

SUSTAIN RESULTS

OHIOHEALTH'S MANAGEMENT SYSTEM

10 MAJOR ELEMENTS…

KPIs and Frontline Problem Solving
Gemba Walks
Process Observation Boards
Tiered Huddles
Kaizen/A3 activity

Lean Roadmap
Leader Standard Work
Breakthrough Goal Deployment
Operational Excellence Goal Deployment
Leader Behavior Assessment Tool

…all working *cohesively* to improve organizational performance

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MANAGEMENT SYSTEM
BY THE NUMBERS

750+ Standardized KPI Boards

65 Daily Gemba Walks

30 Strategy Deployment X-Matrices

60+ Kaizen Events / Year

16 Business Units with Tiered Huddles

Cleveland Clinic

MAYO CLINIC

nova scotia health

DEFENSE HEALTH AGENCY

Nationwide

NHS Medway
NHS Foundation Trust

21 Organizations from

4 Countries

Intermountain Healthcare

Premier Health

Quantum HEALTH

DukeHealth

IWK Health Centre

BAPTIST MEMORIAL HEALTH CARE

THE OHIO STATE UNIVERSITY
FISHER COLLEGE OF BUSINESS

CHEO

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TEAM OF 11

Support an organization of **35,000 associates**

Build an **internationally recognized** management system

Drive organizational performance, exceeding **top decile** in balanced scorecard measures

Achieve department Associate Engagement Scores in the **93rd %ile**

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3 KEYS TO SUCCESS

1

Team Structure & Coverage Model

2

Leadership Engagement

3

Standardization
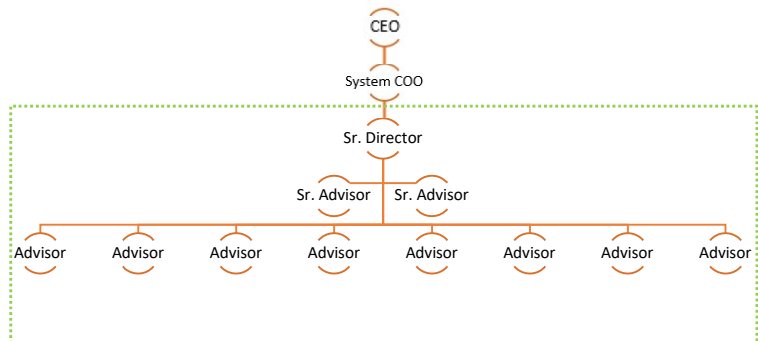
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Team Structure & Coverage Model

12

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LEAN PROMOTION OFFICE

- Centralized function, residing in Corporate
- Project Management & Change Management not in scope
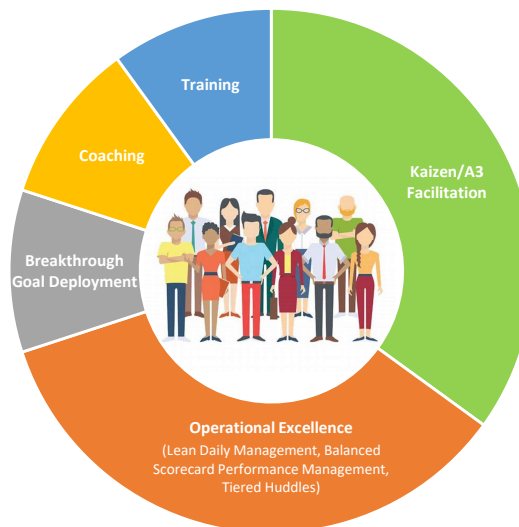- Directly report to OhioHealth's Chief Operating Officer

CEO

System COO

Sr. Director

Sr. Advisor   Sr. Advisor

Advisor   Advisor   Advisor   Advisor   Advisor   Advisor   Advisor   Advisor

BENEFITS TO REPORTING STRUCTURE:
- Direct visibility & alignment to organizational priorities
- Seen as partner in influencing operational performance
- Speed of change

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LEAN PROMOTION OFFICE

ONE SIMPLE GOAL:

Create 35,000 problem solvers

Training

Coaching

Kaizen/A3 Facilitation

Breakthrough Goal Deployment

Operational Excellence
(Lean Daily Management, Balanced Scorecard Performance Management, Tiered Huddles)

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16 Hospitals

200+ Ambulatory Sites

19 Corporate Functions

10 Team Members

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RELATIONSHIP MANAGER MODEL

LPO Relationship Manager

1-4 Business Units
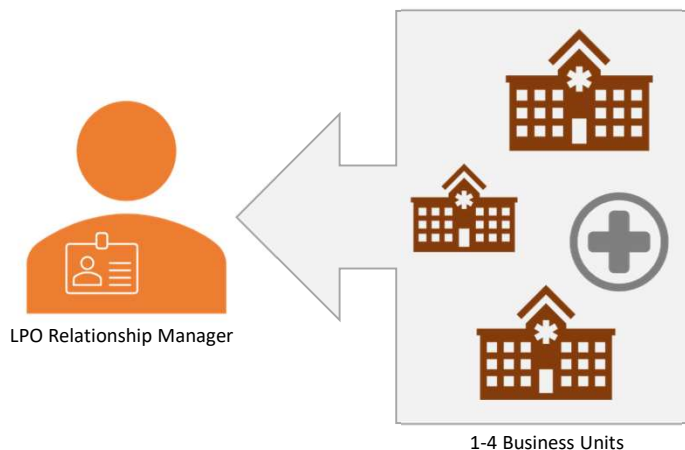
Relationship Manager Primary Responsibilities:

1) Establish & develop local lean leaders
2) Partner to advance local Management System Maturity

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RELATIONSHIP MANAGER
SITE-SPECIFIC RESPONSIBILITIES

RELATIONSHIP MANAGER SITE-SPECIFIC RESPONSIBILITIES:

Coaching local leaders in:
- Balanced Scorecard Performance Management
- Breakthrough Goal Deployment
- Lean Daily Management
- Lean Roadmap Development

SHARED TEAM RESPONSIBILITIES:

- Kaizen facilitation
- A3 facilitation
- System-wide trainings

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LEAN PROMOTION OFFICE
MEET THE TEAM

UNDERGRADUATE AREA OF FOCUS	Business (5) Engineering (4) Nursing (2)
AVERAGE YEARS OF EXPERIENCE	12
INDIVIDUALS WITH GRADUATE DEGREE	3
INDIVIDUALS WITH BLACK BELT	3

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SHIFTING THE RECRUITING LENS

Traditional Candidate Qualifications

- Undergraduate Degree in Related Field
- Graduate Degree
- Lean Six Sigma Black Belt
- Project Management Experience
- 7+ Years Experience

OhioHealth Candidate Qualifications

- Relationship Management Skills
- Coaching Experience
- Skilled Facilitator
- 2+ Years Experience
- Passion for Lean

CLEAR ACCOUNTABILITIES

LEAN PROMOTION OFFICE - FY25 ADVISOR ACCOUNTABILITIES:

Goal 1 – Weighting: 25% - MANAGEMENT SYSTEM
Bring value to the organization through establishing and advancing each component of the OhioHealth Management System. Each component of the management system should be implemented, evaluated, and sustained while delivering excellent customer service and measurable results.
Measured by:
- **Below Expectations Year** = Regular support and communication as described by Relationship Manager responsibilities. Responsive to requests for support.
- **Successful Year** = Partner and influence process owners and care site leaders through regular coaching and advising to:
  - Guide annual Goal Deployment Process to success and adjusting to increase effectiveness.
  - Guide monthly Goal Deployment Process (Breakthrough and Operational Excellence) to success & adjusting to meet standard.
  - Meet monthly with business unit executive(s) who drive the Lean work.
  - Evaluate quality and saturation of management system elements in collaboration with business unit leadership team.
  - Lean roadmap updated and followed to support the above and reviewed on a regular basis with executive sponsor.
  - Collaborate with your business unit leadership team to sustain existing Management System elements while progressing in key elements of management system as defined by system MSAT score improvement from 1.55 to 1.90 by June 30, 2025.
  - Attend 2-3 Gemba walks per month (not necessarily at assigned care site/business unit)
  - Coach executive and front-line leaders in effective utilization of the coaching pattern.
  - Developing leaders to understand the relationship between elements of the management system as a comprehensive way to work instead of independent components.
- **Exceptional Year** =
  - Develop process owner and care site leaders through regular coaching & advising to independently plan and implement monthly Goal Deployment (Op. Ex (Leading Indicator) & Breakthrough) review & adjust to increase effectiveness.
  - Identify, scope, and implement improvement work aligning to Goal Deployment Process in partnership with executive leader.
  - Lean roadmap co-created to close gaps from current state to ideal and continually updated, followed accordingly to support the above, reviewed monthly with executive sponsor, and progress documented.
  - Collaborate with your business unit leadership team to sustain existing Management System elements while progressing in key elements of management system as defined by progressing net > 6 steps towards ideal on the MSAT & 7 out of 10 MSAT elements rated at Proficient or above (mirroring the Care Site President Accountabilities)
  - Attend 3 or more Gemba walks per month (not necessarily at assigned care site/business unit)
  - Develop Executives to regularly articulate how the elements of the management system work together and routinely use the management system as the way we work.

Goal 2 - Weighting: 15% - LEAN LEADER BEHAVIORS
Support and develop OhioHealth's leaders by coaching to clear ideal Lean Leader behaviors.
Measured by:
- **Below Expectations Year** = Minimal progress toward engaging business unit leaders to develop key lean leader behaviors. Occasionally model Lean Leader behaviors based on customer feedback.
- **Successful Year** = Identify and influence lean leader behaviors through:
  - Facilitation of Lean Leader Series sessions based on LPO rotation.

- Leader Training sessions (i.e. LLS, targeted training for all managers, targeted training for all directors) offered at each of your supported relationship management leadership teams 1-2x per year.
  - Recognized by business unit customers as modeling lean leader behaviors based on customer feedback.
  - Establish quarterly pre-planned intentional Gemba walk with a business unit executive with 1:1 debrief with leader following the walk.
  - Presented ideal leader behaviors to business unit leadership. Application of the LBAT Tool adopted by some leaders within the business unit.
  - Leverage Leader Standard Work (LSW), Leader Behavior Assessment Tool (LBAT), and other Lean tools to manage your work and determine development opportunities. Review Leader Standard Work with one-up quarterly.
- **Exceptional Year** = Develop progression of lean leader behaviors through:
  - 2 of 3 Lean Leader Series completed for majority of assigned business unit leaders (using data set of completion rate)
  - Leader Training sessions (i.e. LLS, targeted training for all managers, targeted training for all directors) offered at each of your supported business units three or more times per year.
  - Recognized by business unit customers as consistently modeling and coaching lean leader behaviors based on customer feedback.
  - Establish pre-planned intentional Gemba walk with business unit executives with 1:1 debrief with leader following the walk, at least 8 occurrences per year, including 100% of the business unit Sr. Directors and above (unless more than 8 executives between sites).
  - Application of the LBAT widely adopted by key care site leaders (executives, directors, managers).

Goal 3 - Weighting: 25% - RAPID CYCLE PROCESS IMPROVEMENT FACILITATION
Bring value to the organization by frequently leading rapid cycle process improvement initiatives (Traditional Kaizen, A3, facilitated working session). High frequency and high value work should be performed while delivering excellent customer service and measurable results. Provide support of other LPO team members by maintaining 80% lead facilitator role/20% support role.

Measured by:
- Below Expectations Year =
  - <65% facilitate; >35% support
  - Team completes <50 kaizen
  - <75% of kaizens start within 75 days of assignment or are sent back to intake
  - < 75% of kaizen events with Success Story populated and 30, 60, 90-day measures of success documented
  - <75% of kaizen have a Return on investment identified and populated in the Kaizen Log
- Successful Year =
  - 65-80% facilitate; 20-35% support
  - Team completes 50-75 kaizen
  - 75-85% of kaizens start within 75 days of assignment or are sent back to intake
  - 75% - 94% of kaizen events with Success Story populated and 30, 60, 90-day measures of success documented
  - 75% - 94% of kaizen have a Return on investment identified and populated in the Kaizen Log
- Exceptional Year =
  - 80-90% facilitate; 10-20% support
  - Team completes >75 kaizen
  - >85% of kaizens start within 75 days of assignment
  - > 95% of kaizen events with Success Story populated and 30, 60, 90 days of success documented
  - >95% of kaizen have a Return on investment identified and populated in the Kaizen Log

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LEAN PROMOTION OFFICE - FY25 ADVISOR ACCOUNTABILITIES:

Goal 4 - Weighting: 25% - LPO DEVELOPMENT & SUPPORT
Team member that supports building the culture of the LPO team through collaboration, teamwork, enhancement of LPO workflow/products and 360 feedback.
Measured by:
- **Below Expectations Year** = Frequent attendance at huddle, alignment meeting, internal kaizen. Works independently to build workshops, training, etc. Passive engagement in FY priorities and internal improvement activities.
- **Successful Year** = Actively supports other team members; participates on internal Focus Area A3 initiatives and JDIs; proactively identifies ways to improve LPO processes with team's buy-in; reports monthly on LPO dashboard metrics
- **Exceptional Year** = Identifies new innovative materials and dissemination approach that align with LPO goals; serves as subject matter expert; consistently going above and beyond to assist team members without sacrificing their workload/product; internal & external LPO ambassador; takes the lead on internal Focus Area A3 initiatives and JDIs; proactively owns and drives LPO dashboard metric reporting and improvement; Actively leads or participates on teams that plan and organize team building activities

Goal 5 - Weighting: 10% - Personal Development (PD) A3
Team member develop PDA3 in partnership with their leader and follows the defined IDP process as documented, reviewing PDA3 with one-up on a quarterly basis.
Measured by:
- **Below Expectations Year** = PDA3 process not followed as defined. Sent to Sr. Director and reviewed in 1:1 on < quarterly basis.
- **Successful Year** = Completed PDA3 process as defined. Sent to Sr. Director and reviewed in 1:1 on quarterly basis (ownership to bring forward is on associate). Incorporating identified opportunities in previous FY 360 feedback.
- **Exceptional Year** = PDA3 completed, all objectives accomplished leading to positive unsolicited feedback on targeted areas from improvement in 360 or otherwise documented feedback

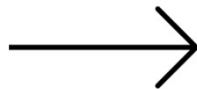- 25% focus on team development & support
- 10% personal development

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Leadership Engagement

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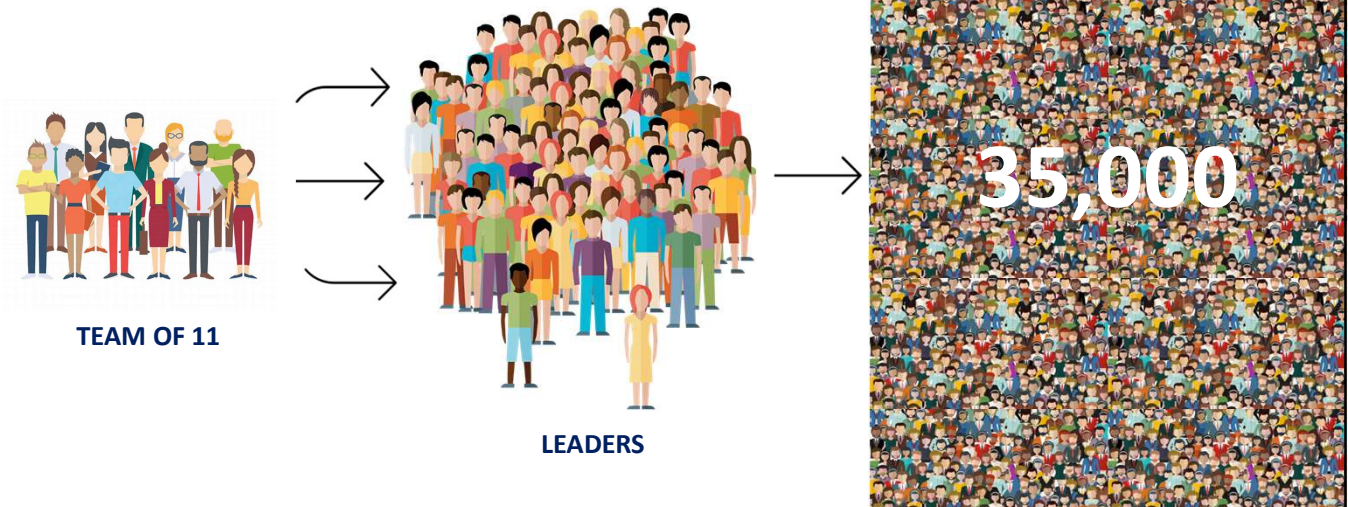---

TEAM OF 11

35,000

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THE APPROACH

TEAM OF 11

LEADERS

35,000

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RELATIONSHIP MANAGER APPROACH

10 MAJOR ELEMENTS...

KPIs and Frontline Problem Solving
Gemba Walks
Process Observation Boards
Tiered Huddles
Kaizen/A3 activity

Lean Roadmap
Leader Standard Work
Breakthrough Goal Deployment
Operational Excellence Goal Deployment
Leader Behavior Assessment Tool

1. Clearly define "what good looks like"

2. Partner with Executive Team to understand current state & gaps to close

3. Support site in development of Lean Roadmap to close targeted gaps

4. Provide coaching, training, and additional support per lean roadmap

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COACHING LEADERS

Balanced Scorecard Performance Management	Breakthrough Goal Deployment	Lean Daily Management	Lean Roadmap Development

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Balanced Scorecard Performance Management

Our organization's approach to setting, tracking, and responding to key operational performance measures for the system.

Leader's Role

- Manage operational excellence metrics and countermeasures when not meeting target
- Cascade metrics

Lean Relationship Manager Role

- Coach and develop system standard processes for review
- Coach and develop leaders to challenge their teams to create effective countermeasures, when appropriate

MANSFIELD BALANCED SCORECARD RESULTS

QUALITY	SERVICE
3.3	2.0

CULTURE	FINANCE
3.1	3.8

OPERATIONAL EXCELLENCE SYSTEM DASHBOARD

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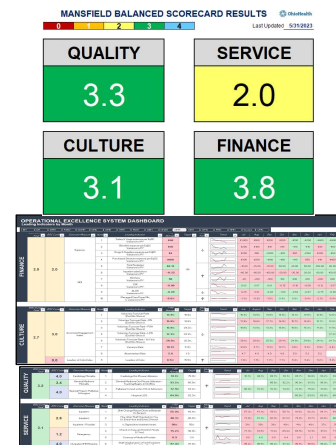
Breakthrough Goal Deployment

Our organization's approach to setting, cascading, and developing actionable plans for breakthrough strategic work for the system.

Leader's Role

- Identify strategic goals
- Cascade goals
- Identify stakeholders
- Execute on plans to achieve breakthrough goals

Lean Relationship Manager Role

- Develop and improve system process & structure
- Coach leaders in identification of focus areas needed to meet their goals

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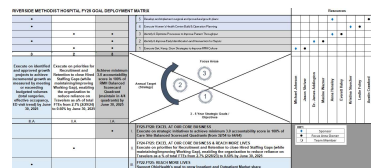
Lean Daily Management

A disciplined, daily process of gathering data and assessing performance metrics. An assessment process drives appropriate behaviors and countermeasures that create a culture of seeing and solving the organizations key problems.

Leader's Role

- Integrate rigor and structure into daily management
- Coach and develop associates in problem solving and metric identification
- Hold teams and leaders accountable to follow the process
- Respect gemba protected time

Lean Relationship Manager Role

- Develop and improve system and processes
- Coach leaders in appropriate use of the system
- Develop leaders as coaches

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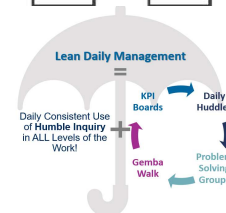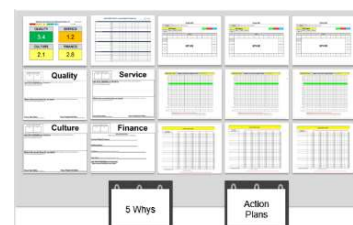
Lean Roadmap Development

A standardized approach to assessing lean management system maturity and visual management of gap closure for the current fiscal year.

Leader's Role

- Self-assess progress on lean maturity
- Identify goals for year-end
- Partner with lean relationship manager to determine the activities needed to close the gap from current state to goal

Lean Relationship Manager Role

- Develop and launch standard format for Management System Assessment
- Coach leaders to appropriate placement during their self-assessment of management system maturity
- Partner with Lean Accountable Executive to determine the activities needed to close the gap from current state to goal
- Facilitate and coach through identified activities

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EXECUTIVE ENDORSEMENT

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Standardization

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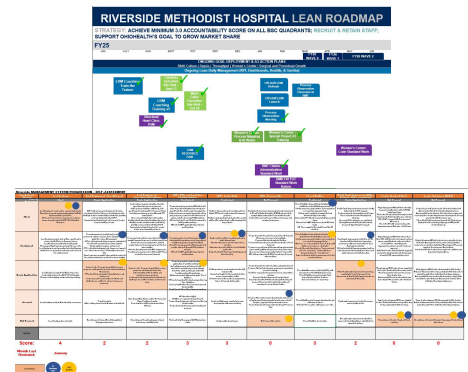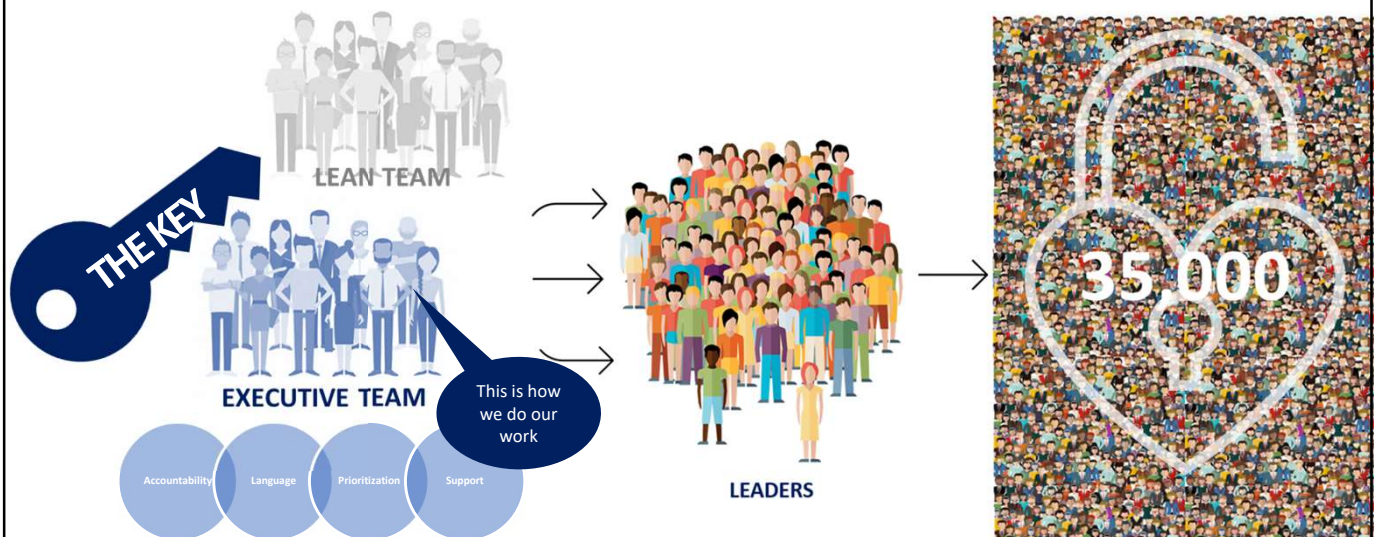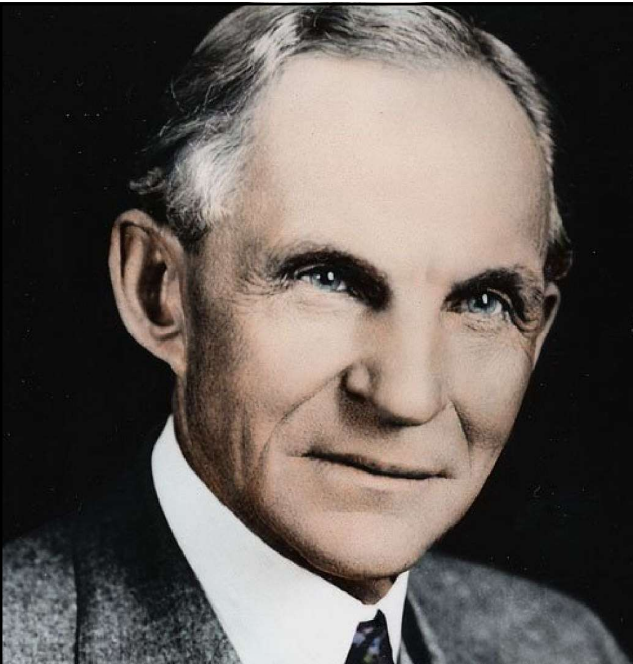
"If you think of standardization as the best that you know today, but which is to be improved tomorrow; you get somewhere."
— Henry Ford

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STANDARDIZATION ALLOWS FOR:

QUICKLY SCALING A COMMON UNDERSTANDING OF LEAN	ALIGNMENT TO BEST PRACTICE	CONSISTENT COACHING	CLEAR ACCOUNTABILITIES	SIMPLIFIED HOSPITAL INTEGRATION	"ONE MANAGEMENT SYSTEM"

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Organization Standards | **Lean Promotion Office** Standards → OhioHealth Management System **Rigor & Sustainment**

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INTERNAL TEAM STANDARDS
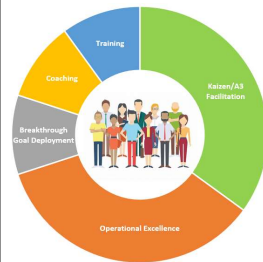
	TRAINING	COACHING	BREAKTHROUGH	OPERATIONAL EXCELLENCE	KAIZEN/ A3 FACILITATION	OTHER
SLIDES & MATERIAL	●	●	●	●	●	
SIGN-OFF STRUCTURE	●		●	●	●	
PREP, COMMUNICATION TEMPLATES, & FOLLOW-UP	●		●	●	●	
COACHING KATA		●			●	
ACCOUNTABILITIES	●	●	●	●	●	●
TOOLSET	●		●	●	●	
FACILITATOR SCRIPT	●		●	●	●	
RELATIONSHIP MANAGER RULES & CADENCE OF ENGAGEMENT	●	●		●		●
HUDDLES						●
ALIGNMENT MEETINGS						●
LEADER STANDARD WORK						●

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ORGANIZATION STANDARDS

<INSERT SITE> MANAGEMENT SYSTEM PROGRESSION - SELF-ASSESSMENT

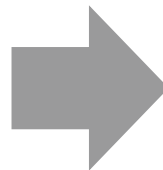| Foundational Element	Lean Roadmap	Goal Deployment - Breakthrough	Goal Deployment - Operational Excellence	LDM - KPIs and Front-line Problem Solving	LDM - Gemba Walk	LDM - Process Obs	Tiered Huddles	Rapid Cycle Improvement (A3s, Kaizens, JDI's, workshops)	Leader Standard Work	Leader Behaviors (LBAT)
Current Assessment										
Ideal	Lean Roadmap is reviewed on a quarterly basis by Executive team and continuously updated with the Business Unit's priorities. Site Lean Process Owner is primary roadmap owner in partnership with LPO Relationship Manager.	GDP is the primary mechanism for driving strategic efforts at the care site/business unit. Multiple leaders comfortable facilitating monthly reviews independently of LPO. Consistent participation of entire senior leader team in monthly reviews.	Leadership recognizes dashboard as the operational measures of success. Op Ex process includes additional, site-specific metrics beyond Performance Close including previous year breakthrough TTI sustainment. Clear connectivity between Executive dashboard and department dashboards exists. Multiple leaders comfortable facilitating monthly review independently of LPO. Consistent participation of entire senior leader team in monthly reviews.	Teams select process-based KPIs that will close department dashboard performance gaps (front-line staff regularly completes 5why root cause analysis, documents action plan progress, evaluates effectiveness of action, and iterates using PDSA cycles). All levels of staff and all shifts engaged in LDM problem solving. 90% of all LDM applicable departments participating.	Walkers show mastery of coaching pattern. Admin KPI board regularly used to improve process. Walkers go beyond system standard (e.g. off-shift walk/ and weekend walk) engaging full department.	Sustainment of process improvements and engagement in Plan-Do-Study-Act cycles (PDSA) when needed, prompted by trends on the Process Obs boards. Leadership reviews Process Obs performance and coaches to process.	Tiered Huddles being utilized daily (including a modified week-end/holiday process). Safety concerns, good catches and recognition are escalated appropriately. Follow-up/escalation is completed and documented by leadership. Information/Feedback is consistently cascaded down. Discussion is 80% look forward and 20% look back. All Tiers complete their huddles within 20 minutes.	Rapid Cycle Improvements can occur mostly independent of LPO support. Clear connection to Goal Deployment strategy. As a result, the outcomes are sustained through documented Standard Work and measured objectively for impact.	Majority (approx 80%) of the leadership team uses month-end results to PDSA task-at-meetings. The Leader Standard Work is comprised of key elements that tie back to your role (ex: IDP, LBAT, accountabilities, personal A3's, etc.). Clear identifiable progress towards improving gaps within your reflections.	Leaders have self-mastery and active development of others in identified ideal leadership behaviors. Business Unit saturation of all leaders leveraging and reviewing their leadership behavior development at least quarterly with their- one-ups. Clear identifiable progress towards ideal behaviors displayed in the mass majority (approx 80%) of the leadership team.
Proficient	Lean Roadmap is up-to-date within a month and is reviewed with Site Lean Process Owner. Lean Roadmap consistently used to guide Management System progression at the care site. Lean Roadmap is used proactively to identify gaps. Activities are planned proactively and reviewed for achievement.	Teams demonstrate proficiency in using the process to achieve targets, leveraging the tools to guide the review & discussion: - A3's / action plans driving progress and updated to reflect learning from previous actions - TTI's effectively demonstrate focus area impact; care site leaders ensure TTI dashboard is up to date - Countermeasures completed or updated regularly for metrics missing target for 2 or more months)	Team regularly achieves operational targets by completing countermeasure actions on metrics. Countermeasures completed or updated regularly for metrics missing target for 2 or more months. Metrics clearly connect to BSC components. Tracking previous year breakthrough TTI's as needed to ensure sustainment.	Teams demonstrate proficiency in using all elements (balanced scorecard, department dashboard, quadrant updates, KPIs). Broad Team engagement with demonstrated results achieved through LDM problem-solving. 70% of all LDM applicable departments participating.	Gemba walkers utilize coaching pattern to guide discussions. Structured process used to onboard new coaches. Admin board exists and debrief with huddle post-walk. Gemba Protected Time consistently honored by leadership.	Teams demonstrate proficiency in using all elements (Process review, pareto tracking). Process Obs boards updated 2x/day. Process Obs boards presented during Gemba at least 5x/week. Teams are proactively utilizing problem solving tools and reinstating KPIs when process deviations occur three or more times consecutively for Process Obs. 80% of departments with KPIs boards have Process Observations.	Tiered Huddles being utilized daily (including a modified week-end/holiday process). Safety concerns, good catches and recognition are escalated appropriately. Clear differentiation between "for awareness" and "for escalation" exists with clear documentation for "escalations." Some feedback to staff is occurring related to escalated items.	Rapid cycle improvement activities are the standard utilized tools for improving processes, with some connection to Goal Deployment activity. Effectively identify process opportunities (and when to use the tools) that lead to rapid cycle improvement collaboration.	Majority (approx 60%) of Leaders share their LSW with their direct reports and one-ups on a monthly basis and review their team's LSV on a monthly basis. Individual Leader Standard Work supports associates stepping into role during gaps of work (TAIP, open position, etc.).	Majority (approx 60%) of leaders leveraging the Leader Behavior Assessment Tool in partnership with Individual Development Plans and populate Performance Evaluations. A few identifiable leaders have mastered a skillset and began developing others.
Basic Application	Lean Roadmap is updated within last quarter. Leadership partnered with LPO Relationship Manager in developing and maintaining roadmap.	Senior Leader Team meets monthly to review progress and demonstrate basic understanding of the process. TTI's identified and populated monthly for each focus area. Leaders provide constructive feedback and challenge one another to advance focus area progress.	Senior Leader Team meets monthly to review progress and demonstrates basic understanding of the tracking and countermeasure process. Leaders provide constructive feedback and challenge one another to close performance gaps.	Teams demonstrate understanding and application of problem solving tools (selecting process metrics, variable run chart data, consistent pareto tracking). Front-line staff participate in the KPI tracking and problem solving. KPI board consistently used to guide Tier 1 huddles. KPI next steps identified and assigned during Tier 1 huddles. Leveraging KPI board as visual management during huddle. Front-line staff are the primary presenters during Gemba.	Walking cadence meets system standard (3+ days/week). Consistent Gemba Walkers scheduled for several consecutive walks. Defined roles of the walker group (scribe, timer, 1st coach, 2nd coach).	Process Obs tools (reviewing processes, consistent pareto tracking). Frontline engagement in process review and problem solving. Process Obs board present in majority of departments with a KPI board and updated daily and prepared to present during Gemba walks and occasional review during Gemba.	Tiered Huddles occurring Daily (M-F), with occasional week-end/holiday coverage. Tiered Huddles present in majority of departments and their leaders. Some escalations are occurring.	Active Rapid cycle improvement occurring, regularly (at least x1 per quarter). Awareness of Rapid Cycle Improvements are communicated locally.	Many (approx 40%) leaders have completed the Leader Standard Work training and is the primary tool leaders use to manage their day-to-day. Business Unit Senior Leadership teams have adopted the use of Leader Standard Work.	Many (approx 40%) leaders have completed the Leader Behavior Assessment training and adopted the tool and are using it to guide their individual development plans. Business Unit Senior Leadership teams have adopted the use of the Leader Behavior Assessment Tool for their individual development journey.
Present	Lean Roadmap exists with leadership awareness.	X-matrix exists. A3's / action plans exist with owners identified.	Operational Excellence and/or Performance Close Dashboard exists. Team familiar with Performance Close Metrics	KPI boards exist(s). Huddles are appropriately cadenced. Teams adequately prepared to present during Gemba walks. Teams demonstrate basic understanding of process.	Gemba walk(s) occur regularly in some departments with some coaching.	Process Obs exists in some departments, metrics are actively moved to process obs boards once retired. Regular, appropriately cadenced review. Teams demonstrate basic understanding of Process Obs.	Tiered Huddles exist in some departments and with some leaders. At least 2 Tiers active within your care site.	Rapid cycle improvement activities occur occasionally at site.	Some leaders (approx 20%) have adopted Leader Standard Work to manage their day-to-day and completed the training.	Some leaders (approx 20%) have completed the Leader Behavior Assessment training and adopted the tool and are using it to guide their individual development plans.
Not Present	Lean Roadmap does not exist.	No evidence of formal Breakthrough Goal Deployment process.	No evidence of tracking key operational metrics on a monthly basis.	No Lean Daily Management (LDM) structure exists.	Gemba walks do not occur.	No Process Obs exists.	Tiered Huddles do not exist.	No rapid cycle improvement activities occurred in last 6 months or scheduled for immediate future.	No evidence of Leader Standard Work existing.	No evidence of Leader Behavior Assessment Tool utilized by leaders.

Management System Assessment Tool

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ORGANIZATION STANDARDS

Management System Overview | *Director*

What is a Management System?

A management system is a structured framework that organizations use to ensure that processes and activities are aligned with their strategic goals and objectives. In healthcare, a management system is particularly useful because it helps streamline operations, improve patient care, and ensure compliance with regulatory requirements. This systematic approach manages daily operations, facilitates continuous improvement and ensures the reliable organization can adapt to changing circumstances while maintaining high standards of care and service.

Management System = the processes, tools, and structure we rely on to define organizational success, drive organizational progress, and sustain progress.

At the core of our management system is a focus on continuous improvement, cultural enablers, and enterprise alignment.

OhioHealth's Management System Elements:

A management system is most effective when used as a cohesive collection of elements rather than independently employed tools. OhioHealth's Management System is composed of a cohesive collection of key elements, each designed to enhance our operational efficiency and patient care. Together, these elements create a robust Management System that supports our commitment to excellence in healthcare delivery:

| Lean Daily Management | Tiered Huddles | Rapid Cycle Improvement | Lean Roadmap | Leader Standard Work | Goal Deployment | Leader Behaviors |

1. *Lean Daily Management* allows for real-time tracking of key performance indicators (KPIs), promoting *frontline problem-solving* to address issues promptly. *Process Observations* involve systematically reviewing and assessing workflows to identify improvement opportunities. *Gemba Walks* involve leaders visiting where the work is done to observe process improvements, engage with staff and provide developmental coaching.
2. *Tiered Huddles* ensure effective communication across all levels of the organization, promoting transparency and quick decision-making.
3. *Rapid Cycle Improvements* enable quick, iterative changes that drive continuous process improvements.
4. *Lean Roadmaps* provide a strategic plan for implementing lean principles, guiding our efforts to eliminate waste and improve processes.
5. *Leader Standard Work* defines the daily, weekly, and monthly routines for leaders to sustain lean practices.
6. *Goal Deployment* aligns individual and departmental goals with the organization's overall objectives, ensuring that everyone is working towards the same targets.
7. *Leader Behavior Assessment Tool* connects the three OhioHealth leadership capabilities with lean leader principles, serving leaders with a clear path forward and resources for their development.

pg. 3

Lean Daily Management | *Director*
Front Line Problem Solving / Gemba / Process Observation

The Why: Creating an organization of 35,000 problem solvers allows us to tap into our greatest potential – our people. LDM is a structured problem-solving system that allow us to assess our current performance, improve our work, and develop a robust problem-solving capability across the organization. When we improve our work, our community benefits as we provide exceptional care for all through experiences that earn a lifetime of trust.

Role & Responsibilities

- Possess a deep, in-depth knowledge of Lean Daily Management
- Coach associates, peers, and direct reports on all aspects of the process (building engagement around the Lean Daily Management process, effective utilization of the KPI Board, shift huddles, problem solving groups, and Humble Inquiry and the coaching pattern)
- Cascade clear expectations for Lean Daily Management as the system of "how we work"; build the foundational lean culture
- Ultimately accountable for the effective utilization of the Lean Daily Management process, including sustainment (inclusive of the process observation system), within their departments
- Continuously develop your managers through regular coaching. Consider coaching to the following:
  - Use catch ball to develop their ability to see trends in the data and their department dashboard
  - Coach them to coach their associates on effective KPI selection and problem solving
  - Through buy-in or change management challenges related to Lean Daily Management
  - Utilization of Humble Inquiry and coaching pattern both in and out of Gemba
  - How Lean Daily Management connects to system goals
  - Developing associates to identify opportunities and relentlessly improve the work they do
  - Developing associates to create sustainable process improvements with associated standard work
  - Creating time for associates to problem solve
  - Expand front line engagement to create more problem solvers
- Engage as a coach on Gemba walk while effectively utilizing humble inquiry and the coaching pattern to empower associates & other leaders (Leader as Coach)
- Continue to grow your coaching skillset in and out of Gemba
- Make time for manager to develop coaching skills and support their development

Resources

- Lean Leader Series
- KPI 'How To'
- LDM Templates
- LDM One Pager
- Next Right Thing
- LDM Element Reference Packet
- LDM Gemba Presentation Script
- KPI Data Collection Video
- LDM and Coaching eSource Page

pg. 4

Management System Resource Guides

Understanding OhioHealth's Management System and your vital role in its success...

Whether you are a well-tenured associate, or new to the organization, getting a full understanding of how OhioHealth operates as a system can be confusing. While we are designing it to be as simplistic as possible, without proper education it can be a challenge to understand how your role fits into all different aspects of our operating structure.

This is why we created a variety of resource guides, based on your role, that explains different aspects of the OhioHealth Management System. This guide will provide high-level education around the element and what your role is in its operation. Please click the button below that best represents your role - each role is vital to the smooth function of our system, and each resource guide is tailored to that role.

Please click the link best associated with your role within OhioHealth's Management System -

| Frontline Associate Resource Guide | Frontline Leader Resource Guide | Manager Resource Guide | Director Resource Guide |
| Business Unit Executive Resource Guide | Sr. Executive Resource Guide | | |

Clear standard work for all levels for each element of the management system

| Associate | Frontline manager | Director | Executive | Senior Executive |

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What's Next?

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DEVELOPING DEEP UNDERSTANDING: LEAN ACADEMY
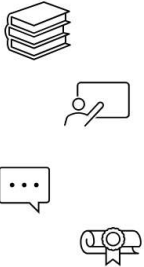
The Lean Academy is a prestigious 9-month program designed to cultivate leaders into on-site Lean experts who will drive cultural and operational excellence. Participants will receive **specialized training, hands-on mentorship, and real-world practice.** Graduates will emerge as invaluable resources, equipped to coach and empower their teams while contributing to the goal of creating a culture of 35,000 problem-solvers.

The FY26 cohort will focus on **Lean Daily Management** – including KPI selection, Coaching, and Humble Inquiry.

How Will the Program Work?

Dedicated track for specialized lean content (**LDM**, A3)	Monthly 4-hour session – hands-on training	Assigned mentor from Lean Promotion Office; 1-2 coaching sessions/month	Learn-See-Do Training Model	Independent facilitator upon completion of the program

Program Timeline

June 2025 — March 2026

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FINAL TAKEAWAYS

Team Structure & Coverage Model
- Org structure matters
- Understand what you're really seeking in candidates
- Create capability to level-load

Leadership Engagement
- Leaders own their lean journey
- LPO acts as teachers, not doers

Standardization
- Clearly define what good looks like, internally and externally
- Operate on "One Management System"

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2025 Lean Summit

REFLECTION EXERCISE

- Discuss amongst your table:
  - What are 1-2 key takeaways from this presentation that you intend to take and apply at your organization in the **next 6 months**?
  - What are 1-2 key takeaways from this presentation that you intend to take and apply at your organization in the **next 1-3 years**?

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QUESTIONS?

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