



## **Lean Knowledge Transfer for Healthcare**

A Maverick Institute White Paper

Phone 303.819.6662  
[info@maverickinstitute.com](mailto:info@maverickinstitute.com)  
[www.maverickinstitute.com](http://www.maverickinstitute.com)

## In Brief

Today's healthcare organizations face an ever-growing need to improve patient outcomes, enhance satisfaction and increase safety for everyone while, at the same time, reducing costs.

In this environment, knowledge transfer between employees, patients and their families, providers, partners and vendors is more critical than ever. The question is, how can we help people:

- learn more quickly,
- with measurably better results,
- without adding to the already high learning burden, and
- without adding resources that increase costs?

**Lean Knowledge Transfer**  
*improves the efficiency and effectiveness of learning and knowledge transfer.*

*Lean methods eliminate waste and add learning value to accelerate knowledge flow.*

The answer is **Lean Knowledge Transfer**, a process that will accelerate the speed, efficiency and effectiveness of knowledge flow throughout your entire healthcare organization.

## Lean: A Methodology to Accelerate Learning, Save Money and Increase Performance

Training in most organizations today uses tremendous amounts of valuable time, money and resources while producing less-than-stellar results.

This is because learning solutions are poorly linked to specific learning goals, weakly tied to organizational objectives and focused on the wrong performance measures.

Lean Knowledge Transfer fixes all of these problems.

Applied to many different processes such as manufacturing, software development and healthcare delivery, Lean has transformed organizations around the world, dramatically improving results and reducing costs.

Maverick Lean Knowledge Transfer™ (Lean KT) applies these powerful methods to training and learning with the goal of accelerating knowledge flow throughout the entire organization.

Lean KT is especially powerful when implemented in healthcare organizations that are applying Lean to their operations as process improvement. Lean transformation requires teaching employees to do things differently, so Lean KT accelerates the Lean operations transformation.

## Managing the Learning Burden

Every healthcare organization has a learning burden, the thousands and thousands of hours that are required of employees to learn the policies, procedures, technologies, standards, codes, laws and behaviors to perform their jobs.

*The ultimate measure of learning success is how quickly an employee performs mistake free.*

The problem is, organizations rarely have anyone who is actively looking at—and managing—that burden. So, it grows and grows, taking more and more time away from patient care and/or research.

And worse, the results of these thousands and thousands of hours of learning activity are less than stellar. People still make mistakes that do harm, increase costs and result in audit findings and fines.

While Lean KT can be applied to a small area of learning, it's far more powerful when it's applied as a strategic effort.

Lean KT helps learning executives measure and monitor their organization's learning burden. Then, it helps them systematically use Lean methods to reduce the burden with the goal of achieving mistake-free performance in employees.

## Measuring What Really Matters

In Lean KT, the only measure that really matters is whether a learning solution helps employees perform better on the job. The goal should always be to achieve mistake-free performance as quickly, and with as few resources, as possible.

(And, yes, this is true even with compliance training, which too often is just a check-the-box activity. Why not make that time and cost pay off in better performance?)

Too often, learning solutions are measured by simple, low-level metrics such as attendance (butts in seats) and satisfaction evaluations (smiley sheets). These measures provide little or no information about the learning solution's impact on job performance or its contribution to organizational objectives.

## Learning Value Streams

A key step in managing an organization's learning burden and improving on-the-job performance is to see learning as a series of value streams. This is a key concept in Lean.

A Learning Value Stream is the sequence of ALL the steps needed, from A to Z, to deliver **mistake-free performance through learning**.

Here's an example of a learning value stream for teaching nurses to use a new EMR (electronic medical records) system:

Individual	Role in Value Stream
Training Department	Hires outside vendor to train.
Nurse Supervisors	Schedule training.
Training Vendor	Conducts the training.
Nurses	Take the training.
IT Dept. Tech Support	Provides remedial help

When organizations don't manage their learning value streams, it results in learning solutions that are uncoordinated and insufficient.

This happens because individuals and groups involved in the value stream have a natural tendency to do what's best for their small part of the stream, not necessarily what's best for the stream overall.

In the above example, Training may hire a highly rated training vendor, but since Training doesn't have in-depth expertise with EMRs, they may choose a vendor that specializes in the software's coding/billing instead of the clinical usage the nurses need.

Even though each individual in the stream fulfills his/her own objective, collectively, the stream fails to deliver its learning goal because the individuals don't (or more often can't) see past their part in the stream and how it affects the overall outcome. In Lean, we call this "sub-optimization."

Lean KT methods transform an ineffective, inefficient Learning Value Stream into a highly coordinated, well sequenced set of steps without training waste and with maximum learning value.

The Lean solution is for one person to take "ownership" of the entire stream, managing it with Lean methods and techniques to make sure each piece is correctly contributing toward the end result.

The outcome is a Learning Value Stream that achieves far greater results in improving learner performance on the job.

*Lean Knowledge  
Transfer methods  
transform an  
ineffective  
Learning Value  
Stream into a  
highly  
coordinated,  
well-sequenced  
set of steps  
without training  
waste and with  
maximum  
learning value.*

## Eliminating Training Waste

One of the primary activities in the Lean KT methodology is eliminating “Training Waste.”

Training Waste is anything that doesn’t directly help the learner perform better on the job. There are eight types:

**Defects:** Errors and mistakes. There are actually two different types of defects. *Learning defects* are things like out-dated or incorrect content or LMS failures. *Organizational defects* are errors and mistakes created when employees fail to perform correctly on the job. A primary goal of Lean KT is to eliminate organizational defects. One way to achieve that goal is by eliminating learning defects.

**Delay:** Making learners wait while content is created or classes are scheduled. Learners should be able to get the learning they need as close to the moment of needing it as possible.

**Over teaching:** Teaching more content than needed to reach the learning goal or more content than learners can handle at one time.

**Unused Talent:** Excluding internal and external experts from learning solutions because they aren’t “professional” trainers.

**Transportation:** Moving people and materials for instruction. Traveling to training classes.

**Inventory:** Storing unused learning content and course materials, or employing trainers who aren’t training.

**Extra Steps:** Unnecessary “doing” to access or create learning content, such as requiring trainers or learners to install complex software or creating overly complex graphics and animation.

**Motion:** Unnecessary searching for information, such as requiring lots of extra and unnecessary clicks in elearning or LMS solutions.

Training Waste is **everywhere**. The more you look for it, the more you will find. It is the thief that steals the effectiveness of your learning solutions.

*The Learning Value Stream owner is responsible for eliminating “training waste” and replacing it with “learning value.”*

## Adding Learning Value

In addition to eliminating training waste, value stream owners must pack the learning solution with as much Lean KT **Learning Value** as needed to achieve the goal. There are eight Lean KT Learning Values:

*The key is to figure out which learning values are most important to meeting the goal.*

**Emotional Connection:** How well learners tap in emotionally to the learning content and presentation. Emotional connection enhances motivation and application.

**Personalized:** The format, amount and rate of learning are all tailored to the individual's learning style, previous experience and the specific situations they're facing.

**Instant Gratification:** Learning content is available exactly when learners need it.

**Credibility:** The most credible sources, from the point of view of the learner, are used to communicate information and influence behavior.

**Push-Pull-Pushback:** Learners pull the learning content they need when they need it. Learning content is pushed when relevant to the learner's time and place. Learners push back by editing, creating and re-sharing learning content.

**Inside Out:** Real experts, internal and external, create learning content and make it available.

**Clear Learning Signal:** Learners know when they need to learn before attempting to perform a task.

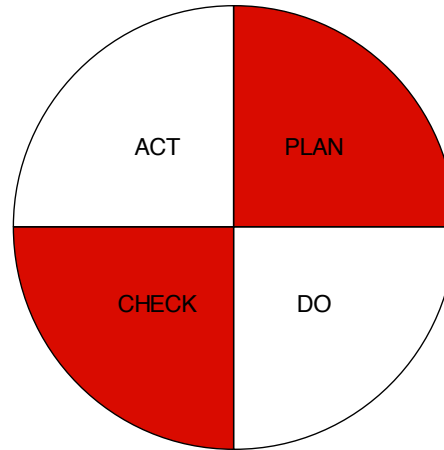
**Alignment:** The learning solution reinforces and complements the organization's mission and values. The medium matches the message.

Not all learning solutions need to have all eight values. The key is to figure out which learning values are the most important to meeting the learning goal and pack the learning solution with those.

## The Plan-Do-Check-Act Cycle

The Plan-Do-Check-Act cycle guides the Learning Value Stream owner and others in improving the Learning Value Stream.

*The PDCA Cycle encourages the Learning Value Stream owner to spend equal time in each quadrant, instead of jumping directly into a learning solution that may not be effective.*



Most training efforts exist almost entirely in the “Do” quadrant. PDCA encourages equal time to be spent in each quadrant, while following a logical process to continually improve.

**Plan:** The Plan quadrant includes activities such as developing a SMART Learning goal, creating a Good Problem Statement, mapping the Learnscape and identifying waste to be eliminated and values to be added.

**Do:** In the Do quadrant, changes are implemented and the improved learning solution (or a whole new learning solution) is deployed.

**Check:** Measurements are taken and results are studied to see whether the learning solution is achieving the goal.

**Act:** If the learning goal is not being met, the PDCA cycle begins again and continues going until results are achieved. If the solution is successful and has not been fully rolled out yet, it is now rolled out to more learners.

## Applying Lean Knowledge Transfer in Your Healthcare Organization

*Lean Knowledge Transfer delivers measurable results that are dramatically better without increasing the current learning burden or adding costly resources.*

Today's healthcare organizations are actively applying Lean methods for process improvement as they seek to improve patient outcomes and increase safety while meeting the economic need to rein in costs.

Adding Lean Knowledge Transfer to that effort accelerates the gains because Lean requires that employees learn new ways of thinking and doing their jobs. The faster they learn and can correctly apply Lean process improvements, the faster and greater the gains.

Even in healthcare environments where Lean is not being implemented, Lean Knowledge Transfer accelerates learning among:

- employees
- patients and their families
- providers
- partners
- and vendors.

The bottom line is that Lean Knowledge Transfer delivers dramatically better and measurable results without increasing the current learning burden or adding costly resources. In all cases, Lean KT improves employee performance while saving training dollars.



## About the Maverick Institute

Founded by long-time Lean practitioner and knowledge transfer expert Todd Hudson, the Maverick Institute pioneered the application of Lean methods to training and learning.

We offer Yellow, Green and Black Belt certifications in Lean Knowledge Transfer. Our certifications combine self-paced learning with one-on-one coaching as candidates work to complete real-world projects with the goal of at least a 10x ROI on their cost of certification.

Our Lean KT certification candidates come from around the world and include learners from some of world's most respected healthcare organizations.

Todd Hudson is an industrial engineer and a Lean Six Sigma Black Belt. He has worked with companies around the globe to solve knowledge transfer problems.

## Want to Know More?

You'll find more information on Lean KT and our certifications at [maverickinstitute.com](http://maverickinstitute.com) or on Todd Hudson's blog.

## Keep Up the Lean Learning!

Subscribe to our weekly emails, which offer mini-lessons, tips and other great ideas you can use to make your learning solutions Lean.

Sign up at [leanCLO.com](http://leanCLO.com).

© 2018 All rights reserved.

No part of this document may be reproduced without the permission of Maverick Institute, Inc. Any use of said material must credit Maverick Institute, Inc.