PDSA Steps and Tools

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Quality Innovation Network -
Quality Improvement Organizations
CENTERS FOR MEDICARE & MEDICAID SERVICES
iQUALITY IMPROVEMENT & INNOVATION GROUP

	Step	Purpose	Procedures	Tools	Outcomes
Plan	**1.** Identify a product or service for improvement	Identify a product (e.g., documentation, product, discharge instructions) or service/ care process/workflow for improvement.	• Identify team • Describe service or product for improvement	• Brainstorming/ Nominal Group Technique • Multi-voting • Statistical tools	• Name of product or service • Team established • Begin story or huddle board
	2. Identify your customers and their expectations	Understand customer requirements and what is needed to meet or exceed them.	• Identify customers and their expectations • Collect data on how well needs are currently being met (baseline)	• Flowchart • Checksheet	• List of customers • List of customer expectations • Add to story or huddle board
	3. Describe current work process	Understand the current process to produce the product or service.	• Create flowchart of current process	• Flowchart	• Flowchart of current process • Add to story or huddle board
	4. Identify improvement opportunities	Select the focus of improvement (beginning and end points).	• Identify existing process complexity • Use existing data to understand scope of complexity • Prioritize improvement opportunities • Select opportunity of greatest concern	• Flowchart • Process map • Multi-voting • Checksheet • Statistical tools	• Prioritized list of improvement opportunities • Agreement on which opportunity to pursue • Add to story or huddle board
	5. Establish and verify cause and effect	Ensure identification of the "root cause" before the process is changed.	• Analyze "root cause" of selected opportunity • Gather data to ensure proper opportunity has been identified	• 5 Why's • Brainstorming • Fishbone Diagram • Data • Scatter Diagram	• The "causes" to be tackled first
	6. Revise the work process	Develop a plan to improve and monitor the process.	• Develop plan to streamline, shorten, simplify, or otherwise improve process	• Brainstorming • Multi-voting • Flowchart • Process Map	• Flowchart of revised process • Add to story or huddle board

[1]Statistical tools include Pareto Chart, Scatter Diagram, Run and Control Charts and Histograms

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Do	**7.** Conduct a small test of the revised process	Test the process change on a small scale before implementing throughout the systems.	• Design a small scale (e.g., one day, one shift, one patient) test of change • Run revised process according to test plan • Collect data on new process	• Flowchart • Checksheet • Run Chart • Scatter diagram	• Data on impact of process revision • Add to story or huddle board
Study	**8.** Evaluate the results	Determine whether the revised process delivers product/service that meets customer requirements. Look for unintended results of the change. If more changes needed, go back to Step 5.	• Confirm effects of process change, check if root cause has been mitigated, any unintended consequences? • Compare the problem before and after using the same indicators • Go to back to PLAN if results are not satisfactory	• Stratify with Statistical tools	• Analyze results of test of change • Recommendation(s) on how to proceed • Add to story or huddle board
ACT	**9.** Standardize and implement the improved process	Implement the improved process widely.	• Conduct training on new process • Communicate improvement procedure and results • Gather data and continuously monitor process to maintain improvement • Implement sustainability procedures to maintain gains	• Flowchart • Checksheet • Pareto Chart • Fishbone Diagram	• Documentation of procedure and results • Add to story or huddle board
ACT	**10.** Measure and analyze customer satisfaction	Establish ongoing feedback about improved product or service with customers.	• Develop mechanism to seek information on customer recommendations	• Brainstorming • Flowchart • Process Map • Pareto Chart • Fishbone Diagram	• Process for collecting customer data • Add to story or huddle board
ACT	**11.** Share and celebrate your story!	Encourage identification of and initiation of future improvements.	• Record team information • Communicate quality story at all levels • Recognize contributors • Plan future improvements	• Story or Huddle board	• Share with others • Plan for continuous improvement • Celebration