

# Are you doing next-gen digital right?

Turn every contact into a net promoter.

Start now.



# About the Workshop

NICE provides these workshop materials for you to use in training your staff. They are designed to last approximately 60 minutes making them ideal for conducting over lunch or as a short refresher where needed.

The workshop can be delivered either in person or virtually. Activities sometimes have to be slightly modified depending on the delivery mode, but instructions are in the speaker's notes.

The **ideal number of participants** for a workshop is 12-18 people. This allows for interactions without it becoming too unwieldy. A smaller group limits the participant interactions and puts pressure on a smaller number of people. A larger group may limit the amount of participant interaction simply because of space, time, noise, and other factors.

A **Participant Workbook** is provided. Print these out (black and white printing is fine) or email them to participants to print themselves. This serves as a record that participants can customize and keep as a reminder of the content for later reference. Encourage people to mark it up and truly make it their own. Note that in the upper right corner of each slide is the corresponding PW number so participants can easily re-orient themselves when necessary.

Activity should begin as soon as participants enter the training room (in person or virtually). This tells people that the workshop is participatory and starts to get them engaged immediately. The first slide (slide 5 in this file) gives instructions for what they should do once they get settled. Be sure to prepare the appropriate flip charts, chat pods, open answer poll questions, or whiteboards ahead of time. And be sure

to circulate and talk to people, learning who they are and personally welcoming them as they complete this pre-workshop activity.

**Introductions:** Because this is a short workshop, no time was allotted for each participant to introduce themselves to everyone else. Introductions can easily take 20 minutes, and that's one-third of the time allotted for the entire workshop. Instead, use the pre-workshop activity time to circulate, learn who people are, and introduce them to people sitting nearby. Virtually, participants can introduce themselves in chat as part of the pre-workshop activity.

## PRINTING THE LEADER'S GUIDE

The Leader's Guide is the Notes view of this PowerPoint file. The first 4 pages are instructions for the trainer and are hidden from presentation. You can print these pages in slide view to make them easier to read. For the rest of the PowerPoint file, print the Notes pages so that you will have a thumbnail of the slide with speakers' notes beneath.

## AUDIENCE

This workshop is appropriate for contact center managers and other stakeholders to encourage them to look at and use quality data to improve the larger picture of the organization.

# Preparing to Lead the Workshop

The **key factors for success** in the workshop are how comfortable you are with the material and inserting personal stories to help illustrate the content. To get comfortable with the material, plan to start preparing at least one week ahead of time.

- Read through the speaker's notes a number of times over the first couple of days.
- Make notes of stories you could add and points you want to emphasize.
- Do NOT plan to read the speaker's notes word-for-word. The notes provide background information for the trainer to make sure you are comfortable with all of the content.
- You also do not have to cover every bullet on every slide, and participants certainly don't need you to read them off the slide to them. For each tip, you can say here are some things you can do to support this tip, and then just highlight 2-3 of them. Or you can ask participants to look down the list and choose 1-2 they want to discuss. All of the points are in the Participant Workbook, so everyone has a record of them for reference.
- After you have read through all of the notes several times and made your own notations, practice with your own words, adding your stories. Do this at least once a day for several days ahead of time until you can deliver the entire workshop smoothly and confidently.

## THE DAY OF THE WORKSHOP

If delivering in person:

- Make sure that the room is setup. If people are going to bring food and drinks, make sure they have enough space for those items. And it can be a good idea to have extra paper towels or napkins available.
- Set up flip chart pages with the pre-workshop questions and place them in different places in the room with markers nearby.
- Print out copies of the Participant Workbook and have one at each place.
- Have tent cards at each place for people to write their names upon and display in front of them.
- Make sure you are in the room and ready at least 15 minutes before the workshop is scheduled to begin.

If delivering virtually:

- Make sure you are comfortable with the platform you are going to be using. You should have practiced the workshop on the platform several times ahead of time.
- Email all the participants a copy of the Participant Workbook and encourage them to print them out to use during the workshop.
- Have the pre-activity set up as open-ended poll questions, a divided whiteboard, or multiple chat pods (with maybe a third chat pod for introductions).
- Be present in the virtual room at least 15 minutes before the workshop is scheduled to begin.
- As people enter the room, welcome them and start interacting with them.

# During the Workshop

- **Relax and enjoy the experience.** You've done your preparation, you know the content, so now it is time to enjoy the final product – the delivery of the workshop.
- **Be aware of your time.** Because you want to encourage participation, questions, and discussion, watch out for “rabbit holes” that become a whole workshop in themselves. If time runs short, you might have to curtail participant interaction, but you definitely want to leave enough time for them to complete an action plan before they leave.
- **Encourage participation.** Virtually, let participants turn on their microphones and talk from time to time. Both in person and virtually, ask what participant think or if they would add anything to the tips. Many will already have experience with the topic and will have good points to contribute. Additionally, dealing with participants' questions as you go along helps to customize each workshop to the people who are present.
- **Tell stories.** Stories help make points clearer and help increase engagement. You want to tell personal stories that are short and to the point. A five-minute story has to be really gripping to keep people's attention, but a short 30 second story can help clarify the content and keep people engaged.
- **“Nudge Your Neighbor” activities:** Keep these to just 30-60 seconds and then move on. People don't have to share with everyone the things they share with just one or two other people during these activities. These activities get the participants to pause and reflect and decide what they might do with the information.

## AFTER THE WORKSHOP

Take the time to reflect on your delivery – what went well and what could be improved. Write down a few notes for your future reference.

If you administered an end-of-training workshop, read through people's responses to aid your reflection and improvement.

Congratulate yourself on leading a successful workshop.

Which workshop will you deliver next? NICE has a number of 1 hour training workshops. Browse our catalog and choose your next topic.

# Workshop Overview

Topic	Activity	Time Allotted	Materials
Introduction and overview	Pre-workshop activity Course goal and agenda	2 minutes	PPT 5 PPT 6-7; PW 1-3
The purpose of your quality program	Discussion Presentation Nudge Your Neighbor	3 minutes 5 minutes 1 minute	PPT 8-9; PW 3 PPT 10-12; PW 4-5 PPT 13
Using quality data	Presentation Nudge Your Neighbor Presentation Nudge Your Neighbor	10 minutes 1 minute 8 minutes 1 minute	PPT 14-17; PW 5-6 PPT 18 PPT 19-20; PW 6-7 PPT 21
Helpful analysis tools	Presentation Nudge Your Neighbor Presentation Nudge Your Neighbor	11 minutes 1 minute 8 minutes 1 minute	PPT 22-26; PW 7-9 PPT 27 PPT 28-29; PW 10 PPT 30
Close	Review Action Plan Final Comments	3 minutes 5 minutes 1 minute	PPT 31-32 PPT 33; PW 11 PPT 33-34

Total Time = 60 min

PPT = PowerPoint Slide

PW = Participant Workbook

# Welcome!

Once you get settled, answer these questions:

What is the PURPOSE of your quality program?

What is your agents' biggest complaint about your quality program?

Describe one way you have used quality data to improve a product or process.



# **Quality and the Big Picture**

A Training Workshop

# Course Overview

Quality monitoring is conducted in contact centers across the globe to build better agents – one agent at a time. However, often the biggest payback to our quality efforts can be made by understanding common problems and emerging trends and addressing those issues at the macro level.

The **goal** of this course is to examine tools that will help you use quality data to make macro level improvements.

- Introduction and overview
- The purpose of your quality program
- Using quality data
- Helpful analysis tools
- Close



# The Purpose of Your Quality Program



# Why Does Your Company Monitor Quality?

# Some Common Purposes

1. Measure agent adherence to internal policies and procedures
2. Improve consistency and quality of customer interactions across all channels
3. Assess business execution – detect and fix broken or inefficient policies, processes, or operational issues throughout the company
4. Improve agent performance
5. Identify agent training needs
6. Identify policies or processes that frustrate and alienate customers
7. Maximize every customer interaction
8. Identify business trends
9. Improve the customer experience
10. Identify product improvements and potential new products

# Four Causes of Customer Dissatisfaction



10-20% due to employee will or skill issues.



20-30% due to not setting proper customer expectations during sales or onboarding



20-50% due to product and process design issues



20-30% due to customer mistakes – not reading directions or unreasonable expectations

# Sample Quality Program Purpose Statement

---

“The goal of our quality monitoring program is to engage our staff in meaningful discussions that lead to an improved customer experience, greater efficiency, and develop a culture of learning and trust.”

# Nudge Your Neighbor

How does your current quality program stack up? Does it engage your team and develop a desirable culture? Or is it punitive in nature, making it difficult to have meaningful conversations that recognize a job well done?



# Using Quality Data

# When Working with Data...

## **DO:**

- Consider all of your options
- Think creatively
- Test relationships
- Manage the outliers and understand that outliers may be best practices
- Know that averages can lie
- Look at more than one metric before drawing a conclusion

## **DON'T:**

- React without understanding the data
- Collect lots of measures just for reporting and comparison purposes
- Don't react too quickly to data.
- Assume that co-variant relationships are causal





# Data is Not Enough

Observation can help...

- Determine what is really going on (vs. what we think is going on)
- See where we are consistently having problems
- Identify trends
- Understand the root cause as to why something is happening



# Where to Look...

## **DOWNTIME**

### **Acronym**

**D**efects

**O**verproduction

**W**aiting

**N**on-Utilized Talent

**T**ransportation

**I**nventory

**M**otion

**E**xtra Processing

# Nudge Your Neighbor

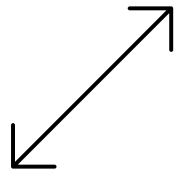
What is one example of Non-Value-Added activity in your contact center?



# Non-Value-Added Activities

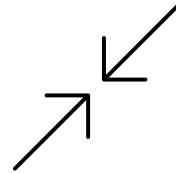
## Optimize

When only about 10%  
value-added



## Minimize

No value-add,  
but still necessary



## Eliminate

Mostly no  
value-added



Does it  
help our  
customers?



# **ASK Quality Auditors and Agents**

- What are the top five reasons that customers contact us that are preventable?
- Design incentives to encourage them to surface wider issues.
- Be sure to communicate back as you make changes so that they know their input is appreciated.

# Nudge Your Neighbor

What is something you can do to better utilize your quality data and/or add in observation to make improvements?



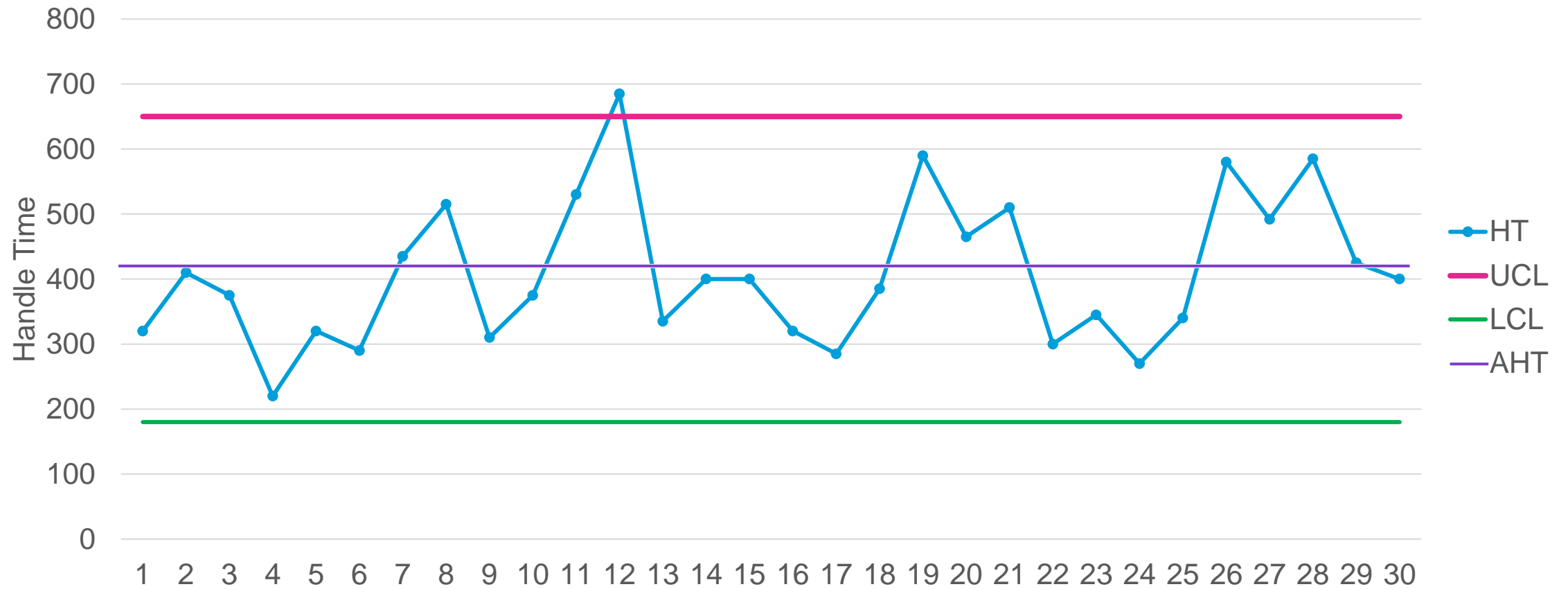
# Helpful Analysis Tools

# Some Analysis Tools

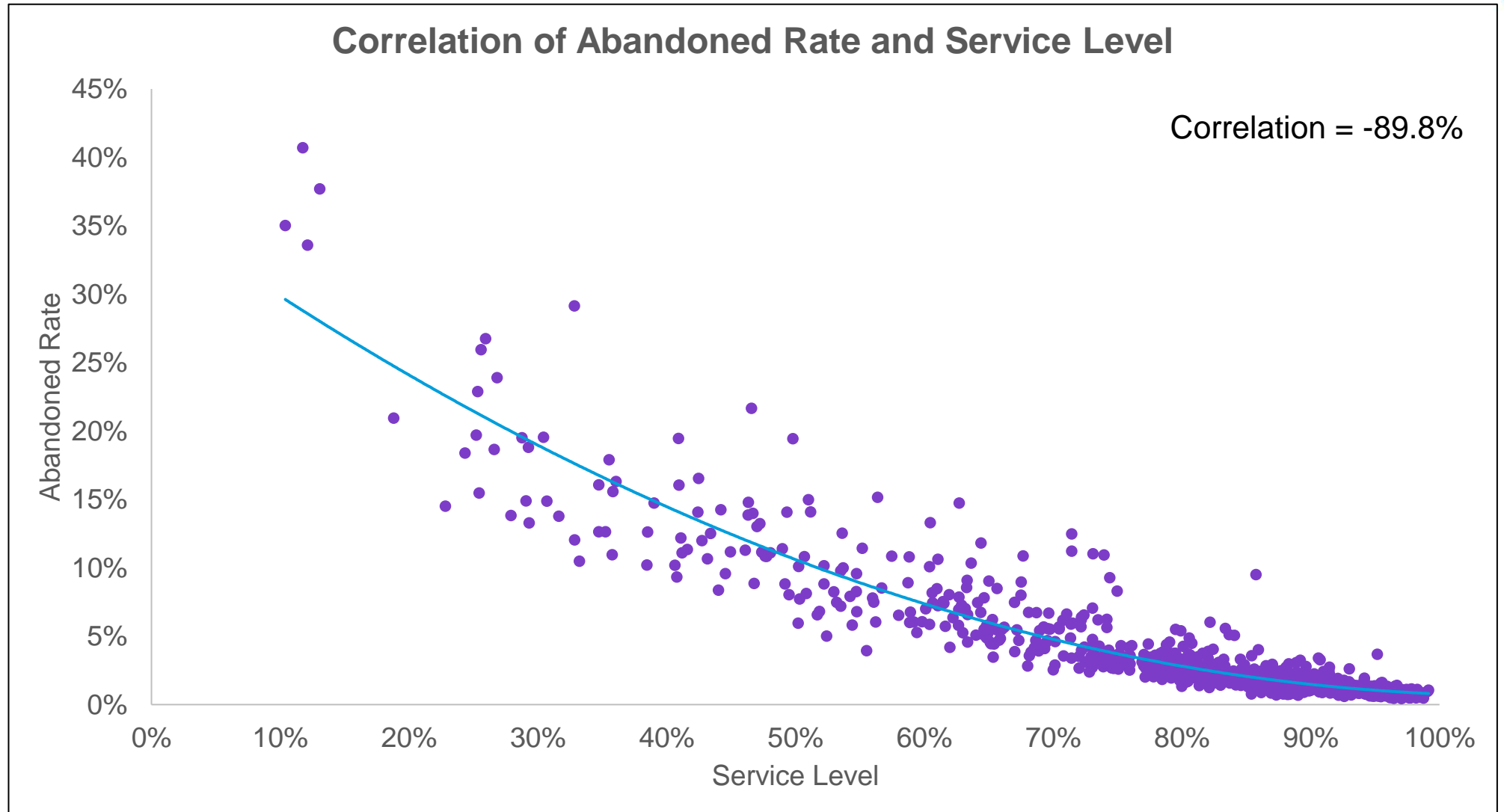
- Control Charts
- Scatter Diagrams
- Pareto Charts
- Root Cause Analysis
- PDSA – Deming Cycle



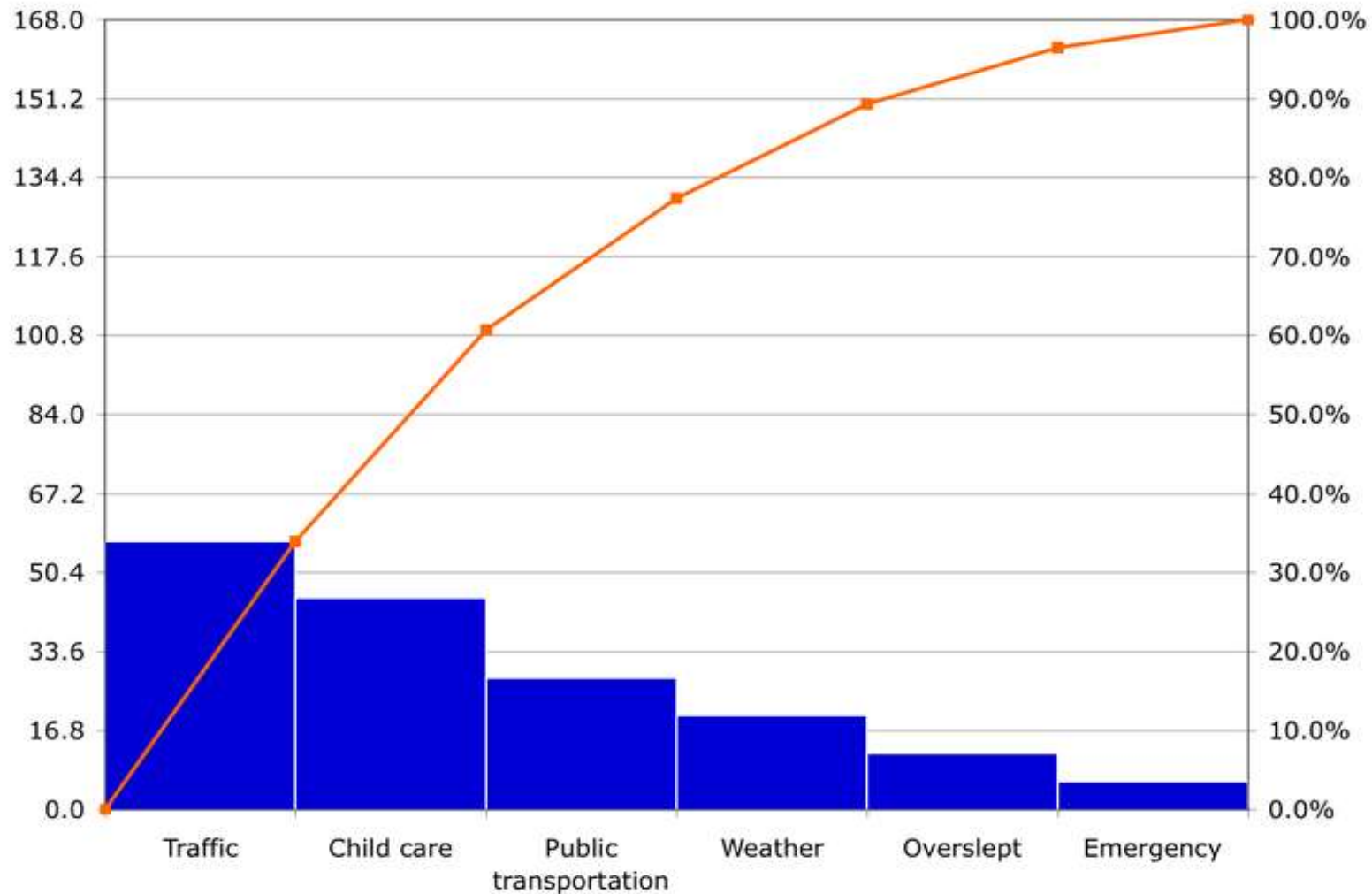
# Control Charts



# Scatter Diagrams



# Pareto Charts



# Nudge Your Neighbor

How might you use control charts, scatter diagrams, or pareto charts to make improvements in your organization?



# Root Cause Analysis

Define the Problem



*What* is happening?  
*How* should it be different?  
*When* does it happen?  
*Where* does the problem occur?  
*Who* is involved?

Collect Data



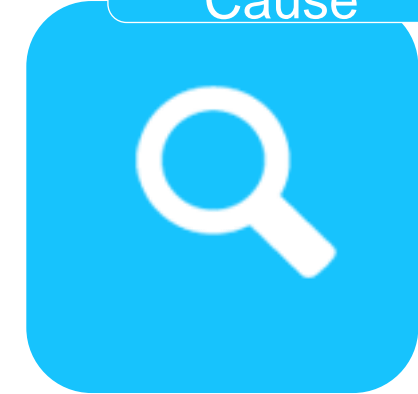
What proof do you have that the problem exists?  
How long has the problem existed?  
What is the impact of the problem?

ID Possible Causes



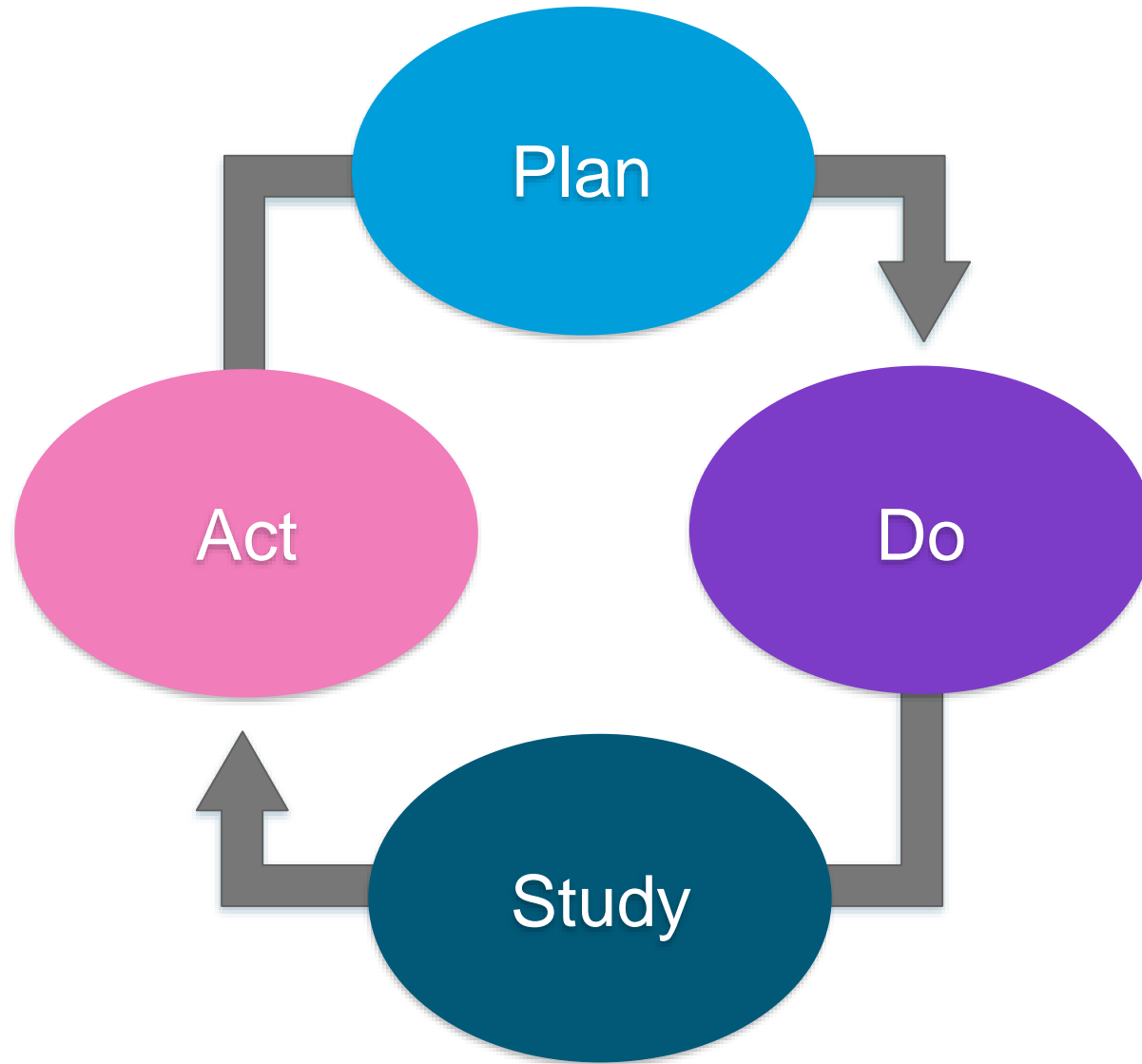
What sequence of events leads to the problem?  
What conditions allow the problem to occur?  
What other problems surround the occurrence of the central problem?

ID the Root Cause



What is the real reason the problem occurred?  
Why does the cause exist?

# PDSA – The Deming Cycle



# Nudge Your Neighbor

How might you Root Cause Analysis or PDCA cycles to make improvements in your organization?



**Close**



# Review

## The Purpose of Your Quality Program



## Using Quality Data

**D**efects  
**O**verproduction  
**W**aiting  
**N**on-Utilized Talent  
**T**ransportation  
**I**nventory  
**M**otion  
**E**xtra Processing



## Helpful Analysis Tools

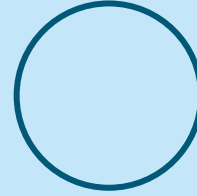
- Control Charts
- Scatter Diagrams
- Pareto Charts
- Root Cause Analysis
- PDSA – Deming Cycle



# Action Plan



What squared or agreed with what you already knew?



What did you learn today that completed a circle of knowledge?



What action will you take as a result of the workshop?



What did you see from a new angle?



# Quality and the Big Picture

A training workshop

© 2021 by NICE. All rights reserved.

<https://www.niceincontact.com/>

Developed by Elaine Carr and Laura Grimes  
of Harrington Consulting Group  
(<https://www.harringtonconsulting.us/>)



# Speaker Notes – Slide 9

We are first going to discuss the purpose of your quality program so that you can be clear on what it is or is not designed to do.

# Speaker Notes – Slide 10

- Many contact centers jump into designing or assessing their quality program without considering the purpose of the program.
- If you asked your agents the purpose of the quality program, their response might be “To catch me doing something wrong.” The quality monitors might agree with the agents, viewing their job much like the police who have a quota of tickets to issue to wrongdoers. Supervisors might say that the purpose is “To keep everyone in line.” But none of these are good purposes for your contact center quality program. If people really believe these are the purposes for your quality program, then it is time to examine your complete program from the ground up.
- Refer back to the pre-workshop question on the purpose of their quality programs.

# Speaker Notes – Slide 11

## Discussion

- Which of these do you think your quality program SHOULD address? Which are primary and which are secondary?

# Speaker Notes – Slide 12

John Goodman, a contact center customer satisfaction guru, has said that at most, 20% of customer dissatisfaction is due to agents misbehaving. Across all industries, Goodman has found four broad causes of dissatisfaction. The specific allocations vary by industry:

- 10-20% due to employee will or skill issues.
- 20-30% due to not setting proper customer expectations during sales or onboarding
- 20-50% due to product and process design issues.
- 20-30% due to customer mistakes – not reading directions or unreasonable expectations.

So if the sole purpose of your quality program is to monitor agent performance, you are not getting your money's worth from your program.

An effective quality program provides the contact center with a vehicle for measuring the quality and consistency of service delivery, while capturing customer insights, and identifying business trends. It is NOT all about nit-picking agent performance.

The purpose of the quality program should align with the business's goals – their vision, mission, values, goals, and objectives. Quality assurance is a dynamic and iterative process that must be adapted as a business changes.

# Speaker Notes – Slide 13

This is just a sample purpose from one contact center. Ask for opinions on this purpose.



# Speaker Notes – Slide 14

They should pair up with someone sitting nearby and share their response to these questions. Allow 1 minute for responses and then move on.

# Speaker Notes – Slide 15

Before we get into some specific tools for analyzing quality data, let's look at some general principles.

# Speaker Notes – Slide 16

## DO:

- **Consider all of your options.** Take a wide view rather than too quickly focusing in on one possibility
- **Think creatively.** What are all the possibilities for the data?
- **Test relationships** between your data points.
- **Manage the outliers and understand that outliers may be best practices.** The data may indicate an outlier—an exception to the rule—which can be managed in isolation rather than indicating a problem that needs to be addressed. Or that outlier might actually be a best practice. Look closer.
- **Know that averages can lie.** For instance, have you ever seen one bad call, one long call, one unusual circumstance that then causes the agent's quality score, average handling time, or other metric to be below standard? This means that you cannot just look at averages but must look at data for individual occurrences.
- **Look at more than one metric before drawing a conclusion.** Make sure that you aren't causing a problem somewhere else by focusing on just one metric.

## DON'T

- **React without understanding the data.** For example, just because a person's or team's AHT is high, does not mean they are doing anything wrong. Are they getting the hardest calls? Are they new hires during a period when the supervisor is not available to help? Are they taking a few extra seconds to insure First Contact Resolution? All kinds of things could be going on.
- **Collect lots of measures just for reporting and comparison purposes.** Too much data can sometimes obscure meaningful conclusions.
- **Don't react too quickly to the data.** Study it and brainstorm thoroughly before implementing a solution.
- **Assume that co-variant relationships are causal.** Just because two measures move the same way, or move in opposite ways, it doesn't mean that they are related or are causing each other to change.

# Speaker Notes – Slide 17

Don't get so caught up in data that you fail to go and see what is happening. While asking questions is also powerful, sometimes questions don't uncover enough information to be helpful and that is where observation comes in. Go to the source – the floor – and see what is really happening, where the consistent problems are, what the trends are, and determine root causes. Then you can more adequately make process improvements and change the situation. In the contact center, this may mean doing side-by-sides with agents on the phone, in chat, doing emails, etc., Or it might mean sitting in the midst of your team doing your work while observing what is going on around you.

For example, I had a remote center handling phone calls and emails. We noticed some odd wording in a number of customer emails, and I asked the manager, the QA manager, and the supervisors at the remote center where this odd wording came from. No one could tell me. I took a trip up to the contact center and I was on the floor for only 5 minutes when I spotted some text on their display board that instructed them to use the odd wording. I was immediately able to get it removed from the display board and then set about discovering how it got there. But the point is that it only took me 5 minutes to spot the source of the problem that no one else seemed able to spot. Getting out and observing can make a huge difference.

# Speaker Notes – Slide 18

This is a concept borrowed from the manufacturing world. We are looking for waste – any activity that consumes resources but does not create value. These are non-value-added activities. Value-added activities are those that directly contribute to satisfying the needs of the customer.

- **Defects:** Efforts caused by rework, scrap, and incorrect information
- **Overproduction:** Production that is more than needed or before it is needed. In a contact center, this may mean asking for information that is not needed or documenting in too much detail or having to repeat information that was not clear the first time or delivered at too fast a pace for the customer to absorb.
- **Waiting:** Wasted time waiting for the next step in a process. This may be time waiting for a supervisor to be free to approve the action that needs to be taken or to answer a question, especially when we could give the agent greater empowerment to take necessary actions or a better knowledge base for finding their own answers.
- **Non-Utilized Talent:** Underutilizing people's talents, skills, and knowledge, including such things as not empowering agents to help customers.
- **Transportation:** Unnecessary movements of products and materials – such as when the wrong item is fulfilled to a customer.
- **Inventory:** Excess products and materials being processed. In contact centers, information is our main product/material. We can give customers too much information which confuses them. And there are things we do for first contact resolution that may be excessive. Another example is when we tell customers wrong information, and they end up doing more than what is required.
- **Motion:** Unnecessary movements by people. For example, customers being transferred when it is not necessary or because the agent is not empowered to do what is necessary.
- **Extra Processing:** More work or higher quality than is required by the customer. Giving more detail than the customer wants/needs, or repeating things multiple times when the customer has not requested it, are examples of extra processing.

# Speaker Notes – Slide 19

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

# Speaker Notes – Slide 20

- We can't really eliminate all non-value-added activity. For example, waiting for calls is a non-value-add activity that can't really be eliminated, but it can be minimized by good forecasting that leads to scheduling the right number of people.
- When an activity is only about 10% value added, it's time to optimize that activity to see what additional value can be wrung from it as well as making that activity shorter and easier to complete.
- If an activity does not have any value-add, but it is still necessary (such as waiting on calls or verbatim reading of compliance messages), then it's time to minimize that activity, making it as short as is feasible.
- Finally, if an activity is mostly non-value-add, look at how you can eliminate it.
- The value perception of the customer is the one that frequently gets overlooked. Always ask, did it help our customers?

# Speaker Notes – Slide 21

One observation tool that is frequently overlooked is to ASK quality auditors and agents for their observations.

- Ask them for the top five reasons why customers contact them that are preventable. (Then DO something about them!)
- When staff comes up with good ideas, reward them – bonuses, company swag, recognition, extra time off, or whatever will encourage everyone to surface their observations and improvement ideas.
- As you make changes, communicate back to the front-line what you are doing so they know their input is appreciated.



# Speaker Notes – Slide 22

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

# Speaker Notes – Slide 24

Books have been written about quality tools for analysis. We are going to look at these five tools specifically.

# Speaker Notes – Slide 25

Control charts help you look at outliers and determine what is out of line.

- On this chart we show the average handle time for 30 agents. The average for all agents is 420 seconds (purple line in the middle) and it shows the Upper control limit (UCL) at 650 seconds (red line) and a Lower control limit (LCL-green line) at 180 seconds. This means that the company expects AHT to fall in a range of 180 to 650 seconds, which is a wide range.
- In looking at this data, would it help to know that the agent with the highest AHT also had the highest FCR and made the fewest errors and the fewest concessions? This may be an example of the outlier being the best practice. The agent with the lowest AHT also had the lowest CSAT and the greatest number of errors and rework. In this case, the problem is at the LCL rather than at the UCL.
- Control charts are easy to construct in spreadsheet programs like Excel, and you can find several videos on YouTube that can help you do this.

# Speaker Notes – Slide 26

A scatter diagram is a graph in which the values of two variables are plotted along two axes. The pattern of the resulting points reveals any correlation present.

- In this example we've plotted abandoned rate and service level. You will notice that the dots are grouped fairly closely together around the trend line.
- With a correlation of  $-0.898$ , this is a pretty strong statistical correlation leading us to conclude that as service levels rise, abandon rates go down. (Because the correlation coefficient is a negative number, it means that as one rises, the other goes down.) This can be a good argument around increasing staffing during busier times.
- YouTube can also help you find videos to help construct scatter diagrams and understanding what they mean.

# Speaker Notes – Slide 27

Pareto charts are named after the Italian mathematician Vilfredo Pareto who, in the 1800s, claimed that 20% of the population owned 80% of the wealth. Modern quality processes have adopted the Pareto principle that around 80% of the effects are caused by only 20% of the causes. This is also known as the 80/20 rule.

This Pareto chart shows reasons for late arrivals, sorted by frequency of occurrence, but it could instead be expressed as costs, performance level, or some other relevant factor. The curve shows cumulative percentage of occurrence.

When creating a Pareto chart, it usually begins by capturing data, possibly by using a check sheet, and determining what measurement is appropriate – frequency, quantity, cost, time, or some other factor. Also determine over what period the data should be collected, making sure that it is long enough to reveal significant patterns. Once the data is captured for each category, arrange the categories on the bar chart with the tallest bar on the left, stepping down to the shortest bar on the right. Then draw the cumulative importance curve along the top edge of the bars.

A Pareto chart can be used to actively direct improvement efforts to the areas that will have the most impact on results. In this example, if you add the quantities of traffic and childcare, you get an event occurrence of 100.8 and a percentage of 60% on the red line. So, if I were a manager, I would work on traffic issues by changing arrival times and childcare by looking to provide childcare on site or subsidizing it at a near by location. Experience indicates that people are late to work due to getting to the childcare place in a particular time slot and then dashing to work and hitting traffic. If I was successful, 60% of the late arrivals would be cured.

# Speaker Notes – Slide 28

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

# Speaker Notes – Slide 29

## ANIMATED

Root Cause Analysis helps you get beyond the apparent, surface answers and dig down until you find the root cause of your problem, which you can then address. It has four steps, as depicted here.

### [CLICK] Define the Problem

- In defining the problem, you want to answer the questions on the slide. Notice that there is no *why* in this set of questions. You don't want to jump to any hasty conclusions, which is what would happen if you answered *why* here.
- You may want to write out your answers in narrative form, let it sit overnight, and then look at it with fresh eyes the next day to make sure you have clearly defined the problem.
- Note that you want to be sure to define the problem in terms of observable behaviors and keep emotion out of the definition. This means avoiding adjectives and adverbs and just answering in terms of what you have seen—either directly what you have seen the agent do or what you have seen in data reports or what the customers report to the agent.

### [CLICK] Collect Data

- As you collect data, remember the points we already covered about working with data.
- Conversations are often necessary to collect data. Conversations with agents, with quality auditors, with customers, with other departments, with clients, etc.

### [CLICK] Identify Possible Causes

Once you have sufficient data, you should start identifying possible causes. You want to identify as many causes as possible since most often people will focus on just the first one or two, which quite often are only symptoms and not the root causes.

### [CLICK] Identify the Root Cause

- Using the Five Whys Technique (asking WHY five times (more or less) to get to the real reason something is happening) and/or an Ishikawa (or Fishbone) diagram to examine potential causes can be helpful to get down to the root cause.
- When investigating root causes, it is important to determine how far to go in your investigation, using your good judgment and common sense. Theoretically, you could trace root causes back to the Stone Age, but that effort would not be useful. Make sure that the causes you identify are significant and can be changed.
- One tip for identifying root causes is that quite often the opportunity for performance lies in the performance *gaps*—the areas where little or nothing is happening.

# Speaker Notes – Slide 30

The PDSA process, also known as the Deming Cycle since it was created by W. Edwards Deming, a mid-20<sup>th</sup> century engineer and management consultant who is widely acknowledged as the leading thinker in the field of quality.

Use PDSA cycles to test an idea—a process improvement—by trialing a change on a small scale and assessing its impact, then building upon the learning from previous cycles in a structured way before wholesale implementation. Before the PDSA cycle begins, you will have to have a process improvement in mind since this improvement is what you are testing with PDSA.

- **Plan:** the test or observation, including a plan for collecting data
  - State the objective of the test
  - Make predictions about what will happen and why
  - Develop a plan to test the change (Who? What? When? Where? What data need to be collected?)
- **Do:** Try out the test on a small scale, documenting problems and unexpected outcomes.
- **Study:** the results and analyze the data, comparing the data to your predictions. Be sure to summarize and reflect on what was learned.
- **Act:** Refine the process improvement based on what was learned from the test. You might even do additional PDSA cycles to test out your modifications.

When you have confidence in your process improvement, roll it out widespread.



# Speaker Notes – Slide 31

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

# Speaker Notes – Slide 33

ANIMATED

You are going to pull up each section of the training and as it appears, have people call out the points they remember from that section. (Virtually, have them turn on their microphones or write in chat.) Keep this moving quickly, allowing no more than 1 minute before going on to the next section.

[CLICK] for each section to appear.

# Speaker Notes – Slide 34

Allow up to five minutes for people to complete their action plan. As time allows, have volunteers share the action they want to take as a result of the training and/or a new insight they got from this workshop.