

Checklist for Change

Self-Knowledge

The Four Tendencies	Upholder, Questioner, Obliger, or Rebel	
Distinctions	Opener/ Closer; Moderator/ Abstainer	

Pillars of Habits

Monitoring	You manage what you monitor, so find a way to monitor whatever matters.	
Foundation	First things first, so begin by making sure foundations are in place.	
Scheduling	If it's on the calendar, it happens.	
Accountability	Everyone does better when someone is watching, so plan for watching.	

The Best Time Begin

First Steps	It's enough to begin; if you are ready, begin now.	
Clean Slate	Temporary becomes permanent, so consider coinciding with other big changes, when you have a 'clean slate'.	
Lightening Bolt	A single idea can change the habits of a lifetime, overnight.	

Desire, ease, and excuses

Abstaining	For some of us, moderation is too tough; it's <i>easier</i> to give up something altogether (i.e. give up the old system).	
Convenience	Make it easy to do right and hard to go wrong.	
Inconvenience	Change your surroundings to make the incorrect way the inconvenient way.	
Safeguards	Plan to fail. It will happen.	
Loophole-Spotting	Don't kid yourself about what is a barrier, and what is a loophole.	
Distracting	Wait fifteen minutes.	
Reward	The reward for doing the right thing is having done the right thing. Reframe the reward.	
Treats	It's easier to ask more of your team when you are giving more to your team.	
Pairing	Only do X when you are doing Y.	

Unique, Just Like Everyone Else

Clarity	The clearer you are about what you want, the more likely you are to stick to it.	
Identity	The things you do everyday reflect your identity, so if you struggle to change a particular approach, re-think your identity.	
Other People	Your habits rub off on other people, and their habits rub off on you.	

Planning the Change

<p>What change are you testing?</p>	<p>e.g. We are creating a new protocol and workflow to identify and follow-up with those who need a timely postpartum visit. Also include evidence base, if possible.</p>	
<p>What staff is involved in this test?</p>	<p>What positions/ staff/ people in particular will need to do something differently for this test of change?</p>	
<p>What do these staff need to know or do differently?</p>	<p>What specifically are we asking those staff who are involved to do as part of this test?</p>	
<p>How will we provide this instruction?</p>	<p>Include what materials are needed, who will be responsible for creating and monitoring instruction and materials, etc.</p>	
<p>When/ where will we conduct our test of this enhancement?</p>	<p>Include days/ dates as well as sites/ locations/groups, and why you believe this is a representative sample.</p>	
<p>Data Collection Plan</p>	<p>Include what data will be collected and why as well as where/ how that data will be collected. e.g., will use Excel to track those patients identified, follow-up conducted, responses generated from follow-up, and scheduled appts.</p>	
<p>How will you know if the enhancement is successful?</p>	<p>What % change or other specific outcome would need to be seen in order for this to be successful?</p>	