WORKSHEET + WORKED EXAMPLE

Test a Change Before Going Big

A bounded test, a prediction, and a place to compare what actually happened.

15 minutes to plan | PDSA · small tests of change

Use it in three moves

1. Choose one question, a small scope, and a prediction you can compare with an observation.

2. Agree who is involved, what could go wrong, and when to stop. This is a proposed test until those people agree.

3. After the test, study surprises as well as your chosen measure. Decide what to adapt, repeat, or stop.

What are you trying to learn?

One question, not “prove this works”.

What small change will you try, with whom and when?

One team, a short period, or a small number of cases.

What do you predict will happen?

Include a sign you can observe and the reason you expect it.

What must be protected? When would you stop?

Consider workload, access, quality, and the people carrying the test.

Test a Change Before Going Big

YOUR WORKING NOTES / CONTINUED

Who needs to agree, and who owns the test?

A draft plan does not authorize an experiment on colleagues.

What happened, including surprises?

After the test: record observations, timing, and limits of the evidence.

How does that compare with your prediction?

What else could explain the result? What remains uncertain?

What is your next decision?

Choose: Not decided yet / Adapt and test again / Repeat to learn more / Stop this version / Consider a broader test

What happens next, and when?

Name the owner and a date to return to the evidence.

A question for me

What would I be willing to change my mind about?

See one way through

FICTIONAL WORKED EXAMPLE / NOT THE ANSWER TO YOUR SITUATION

What are you trying to learn?

Would a short intake checklist reduce clarification messages?

What small change will you try, with whom and when?

For five routine requests next week, two volunteers will try a three-question checklist.

What do you predict will happen?

At least four of five requests will need no clarification message, because the missing delivery date is usually the issue.

What must be protected? When would you stop?

Keep the existing route available. Stop if entering a request takes longer than five minutes or people cannot use the form.

Who needs to agree, and who owns the test?

Rae owns the test; the two volunteers have agreed. Explain the trial to the receiving team.

What happened, including surprises?

Three of five needed no clarification. Two people still needed help describing the request. One used the existing route.

How does that compare with your prediction?

The date helped. The wording of “outcome” confused two people. Five cases cannot establish a general effect.

What is your next decision?

Adapt and test again

What happens next, and when?

Rae will revise that prompt with the volunteers, then propose another five-case test on Monday.

The thinking behind it

The point is to become more attentive, not to manufacture certainty. Let the people living with the test change your interpretation of what “better” means.

PDSA stands for Plan, Do, Study, Act. The Institute for Healthcare Improvement uses it in the Model for Improvement to learn from small tests and adapt changes through repeated cycles. This is an independently written workplace adaptation, not a copy of IHI’s worksheet.

IHI: PDSA worksheet and explanation

Read The Search For Unapologetic Impracticality In Leadership: Part II - The Seduction of Certainty by Nic Payne