Perception Mapping and Contradiction Resolution of Voice of the Customer (VOC)

Problem Solving Custom Methodology Case Study

David Conley
Innomation Corp
2010
Agenda

- Custom Solution Engine
- Case Study Client and Project
- Solution Engine Process Map
- What is Voice of the Customer?
- What is Perception Mapping?
- What is TRIZ?
- What is Contradiction Modeling?
- How to Develop a Perception Map from VOC
- Scoring the Map
- Contradiction Analysis
- Solution Generation and Evaluation
Custom Solution Engine

- Components from 3 disparate methodologies are merged to create a custom solution engine.

<table>
<thead>
<tr>
<th>Component</th>
<th>Solution Methodology</th>
<th>Methodology Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice of the Customer</td>
<td>6 Sigma</td>
<td>Administrative/Quantitative</td>
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<tr>
<td>Perception Mapping</td>
<td>Flowscape</td>
<td>Administrative/Qualitative</td>
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<tr>
<td>Contradiction Analysis</td>
<td>Theory of Inventive Problem Solving</td>
<td>Science/Qualitative</td>
</tr>
<tr>
<td>40 Principles</td>
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Custom Solution Engine
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Case Study Client

• Presbyterian Healthcare Services (PHS) is a not-for-profit system of hospitals, a health plan and a growing medical group. For more than 100 years, Presbyterian has been committed to a single purpose -- improving the health of individuals, families and communities throughout New Mexico.
  • 7 Hospitals throughout New Mexico
  • Largest provider of health care services in New Mexico
  • 1,200,000 patient visits per year
  • Employees more than 490 Physicians and Practitioners
Case Study Project

- **Problem Statement:** PHS needs to increase utilization of available operating room hours.
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Solution Engine Process Map

1. Problem Statement
   - VOC Refinement
   - Perception Mapping

2. Loop Identification
   - Focus Area ID
   - Contradictions Modeling
   - 40 Principles - Solutions

3. Solution Grading

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Problem Statement → VOC Refinement

Perception Mapping

Loop Identification → Focus Area ID → Contradictions Modeling

40 Principles - Solutions

Solution Grading
Voice of the Customer (VOC)

• **Voice of the customer** (VOC) is a term used in business and Information Technology to describe the process of capturing a customer's requirements. In this case study the VOC was in association with a 6 Sigma analysis.
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Problem Definition

Problem Statement → VOC Refinement

Perception Mapping

Loop Identification → Focus Area ID → Contradictions Modeling

40 Principles - Solutions

Solution Generation & Analysis

Solution Grading
Perception Mapping

• Graphical Representation of Perception Interrelationships
  – a refinement by Darrel Mann of flowscape methodology defined in DeBono’s Water Logic, Viking 1993
• Used when manifold perceptions about a situation or problem exist within various inter-related teams:
  – Customers, Management, Finance, Automation, etc.
• Focuses the problem analysis on:
  – Most unifying perceptions in the set
  – Perceptions that conflict with each other
  – Perceptions that create logical loops (positive or negative)
• Perceptions can be gathered directly by survey or distilled from 6 Sigma Voice of the Customer (VOC) and/or Critical to Quality (CTQ) summaries
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What is TRIZ?

• Science of Inventive Problem Solving
• Developed by Genrich Altshuller (Soviet engineer working in the naval patent Office) beginning in 1946
• Based on the analysis of over 3 million patents
  – Inventing is based on understanding and resolving contradictions
  – Every method used to solve contradictions can be summarized into a set of Inventive Principles
What is TRIZ?

- 1975 - Altshuller’s R&D had resulted in all of the major components of Classical TRIZ being conceptualized or developed.
  - Created & validated through patent analysis:
    - 40 Inventive Principles
    - Engineering Contradiction Matrix
    - Trends of Engineering System Evolution
    - Substance-Fields and Standard Inventive Solutions
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Problem Statement → VOC Refinement

Perception Mapping

Loop Identification → Focus Area ID → Contradictions Modeling

40 Principles - Solutions

Solution Grading
Contradiction Modeling

• Rudimentary to the Theory of Inventive Problem Solving
• Almost all programs, projects, or efforts are put in motion to address a contradiction
• Contradictions are situations where existing conditions make a desired result difficult or impossible
• Once a contradiction is accurately understood it is fairly easy to find ways to resolve it
• Example:
  – “If I grant surgeons dedicated blocks of time in the OR then they are guaranteed access but overall utilization of the OR can be lower than desired.”
    • Contradiction Refinement
      – Facility availability to specific customers versus overall facility utilization
Contradiction Modeling

• Both Technology and Business problems are resolved when their underlying contradictions are addressed.

Technological Contradiction – A narrow hulled ship is fast but is also unstable

One solution – narrow and wide hull

Narrow (to the water)  Wide (to the ship)
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Solution Generation & Analysis

40 Principles - Solutions

Solution Grading
Perception Mapping

1. Distil VOC statements to a set of independent concepts
   – Good
     • I need scheduled access to the OR when needed
     • I need my start times in the OR to be predictable

   Independent Concepts

   – Bad
     • I need scheduled access to the OR when needed
     • I need to be able to know when I will be utilizing the OR so I can plan my clinic schedule

   Related Concepts – represent same need
### Perception Mapping

#### 2. List Independent Concepts and Label with an Alpha Character

<table>
<thead>
<tr>
<th>Alpha Identifier</th>
<th>Perceptions</th>
</tr>
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<tbody>
<tr>
<td>A</td>
<td>Dedicated rooms help patient access for on-call issues</td>
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Perception Mapping

3. For each VOC Statement (Perception) ask “what other perception on the list does this perception lead to most?”
   - Each perception can lead to one, and only one, other perception
   - A perception can have multiple perceptions that lead to it

   - Example:
     B – Rooms dedicated to specific usage models (i.e., brain surgery) have a negative impact on utilization
     • MOSTLY LEADS TO
     T – Rooms outfitted for any and all procedures (i.e., universal rooms) would help utilization

4. Document those relationships
Perception Mapping

5. Record “leads to” relationships between the perceptions

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Perception Mapping

6. Draw a graphical representation of the relationships
Perception Mapping

7. For each VOC Statement (Perception) ask “are there other perceptions on this list that conflict with this one?”

– Example:
  D – Block scheduling reduces communication requirements
      • CONFLICTS WITH
  J – Need access outside of block time

8. Capture those relationships – if any
## OR Scheduling Perception Mapping (PM)

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Perception Mapping

11. Score each Perception Based on its Map Location

- If Perception is:
  - Part of a Loop – score 4 points
  - In a Conflict Chain – score 3 points
  - A collector of other Perceptions – score n-1 points (where n = # of Perceptions leading to that Perception)

- For Example:
  - Perception J is in a Loop = 4 points
  - Perception J is in a Conflict Chain = 3 points
  - Perception J is a Collector = n-1 = 4-1 = 3 points

- Total Points for J = 10
Perception Mapping

11. Score each Perception Based on its Map Location

Perception J is in a Loop = 4 points
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Perception J is a Collector = n-1 = 4-1 = 3 points
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12. Record all of the Perceptions Scores and Total

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### Perception Mapping

13. Rank Order Perceptions from Largest to Smallest Total Score

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## Perception Mapping

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Solution Engine Process Map

Problem Definition
- Problem Statement
- VOC Refinement

Perception Mapping
- Loop Identification
- Focus Area ID
- Contradictions Modeling

Solution Generation & Analysis
- 4a
- 4b
- 4c

40 Principles - Solutions

Solution Grading
Perception Mapping Goal

- Identifying loops of perceptions that either need to be reinforced or eliminated
  - Loops of perceptions are self reinforcing which either need to be supported (good self reinforcing loops) or terminated (bad reinforcing loops)
- Identify the correct problem(s) to address when improving a process or situation
  - While each perception implies a problem to be addressed, understanding how perceptions relate to each other can identify which perceptions “problems” will most effectively address the entire group of perceptions (Perception Mapping and Scoring)
- Identifying contradictions inherent to the selection of perceptions
  - Some perceptions will directly conflict with each other. One of the attributes of TRIZ is its ability to formulate and then transcend contradictions so that each perception is addressed without compromise
Focus Area ID

• Choose high scoring Perceptions to address
  – Perception “T” scored the second highest at 9 points
    • “Universal Operating Room would help the over utilization of the facilities.”
  – Turn the Perception into a Contradictory Statement
    • “If I have universal ORs then my utilization will be improved but the cost of developing the universal ORs will be very high.”
  – Using the Parameters off of the Innomation, LLC Business Contradiction Matrix (InnomationLLC.com) reframe the contradiction and solve using 40 Principles
## Perception Mapping

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Solution Engine Process Map

Problem Statement → VOC Refinement

Perception Mapping

Loop Identification

Focus Area ID

Contradictions Modeling

40 Principles - Solutions

Solution Grading
Loops

• Self Reinforcing:
  – Loops reinforce themselves and are therefore self-sustaining
  – Positive Loops – we want the loop to continue as it has a positive effect on our issue
    – Find ways to further reinforce the positive loop
    – Insure that solution do not impeded the positive loop
  – Negative Loops – we want the loop to stop as it has negative effects on our issue
    • Find ways to weaken the negative loop
    • Insure that solution do not support the negative loop
Loops

J – Surgeons need access outside of block time, which leads to C
C – The Scheduling Department is critical to the current process, which leads to L
L – The scheduling rules need to be applied consistently, which leads to J

* This is a positive loop – we want it to continue and/or be strengthened
Loops – Solution Generation

J – Surgeons need access outside of block time, which leads to C
C – The Scheduling Department is critical to the current process, which leads to L
L – The scheduling rules need to be applied consistently, which leads to J

Test solution concepts against support or destruction of Loops

* This is a positive loop – we want it to continue and/or be strengthened
Agenda

• Custom Solution Engine
• Case Study Client and Project
• Solution Engine Process Map
• What is Voice of the Customer?
• What is Perception Mapping?
• What is TRIZ?
• What is Contradiction Modeling?
• How to Develop a Perception Map from VOC
• Scoring the Map
• **Contradiction Analysis**
• Solution Generation and Evaluation
Solution Engine Process Map

Problem Statement ➔ VOC Refinement

Perception Mapping ➔
- Loop Identification
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 contraction Modeling ➔ 40 Principles - Solutions

Solution Generation & Analysis

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Conflicts / Contradictions

- D and J are in conflict
  
  - D – Block Scheduling reduces Communication Requirements
  
  - J – Surgeons need access to OR outside of block periods
Conflicts / Contradictions

• Choose parameters from the Innomation, LLC Business Contradiction Matrix that reflect the conditions of the contradictory requirements:
  – D – Block Scheduling reduces Communication Requirements – **Communication Flow**
  – J – Surgeons need access to OR outside of block periods – **Adaptability/Versatility**
Solution Engine Process Map

Problem Statement → VOC Refinement

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Solution Generation & Analysis

40 Principles - Solutions

Solution Grading
Conflicts / Contradictions

• Utilizing a Business Contradiction Matrix:
  – Look up the identified contradiction parameters on the matrix and locate the convergent Principles associated with the resolution of that particular parameter pair
    • 25 – Self service
    • 6 – Universality
    • 37 – Thermal Expansion
    • 40 – Composite Materials
    • 15 – Dynamics
    • 19 – Periodic Action
Conflicts / Contradictions

• Utilize the Business Examples for the 40 Principles (InnomationLLC.com) to help identify what the application of a principle may look like:

• For example: 25- Self Service
  
  A. *Make an object serve itself by performing auxiliary helpful functions*
  
  – Use project work to train employees
  – Place advertisements on your products
  – Gather phone numbers form shoppers for future marketing efforts and to track demographics
  – Use inventory tracking numbers to not only trigger re-orders but also to understand seasonal variations
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40 Principles - Solutions

Solution Grading

6
7

Problem Definition
Problem Modeling
Solution Generation & Analysis
Conflicts / Contradictions

• Use “Focused Brainstorming” to generate solution concepts for the indicated contradiction based on the identified principles:
  – 25 – Self service
    • Remotely accessed web based case scheduling
  – 6 – Universality
    • Develop standardized forms to gather information need for case scheduling

• Principle Combinations – Self service/Universiality
  – Standardized broadcast views of scheduling system (wall monitors, PDAs, etc.)
Solution Engine Process Map

Problem Statement → VOC Refinement

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Solution Generation & Analysis

- 40 Principles - Solutions
  - Solution Grading

Problem Definition

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Solution Generation and Scoring

• Approximately 15-20 Contradictions were analyzed resulting in 384 Solution Concepts
• Solution Concepts should be pared down to the most effective
• Concepts can first be scores against Cost, Implementation Time, and Complexity
• Choose X Short, X Medium and X Long term solutions for additional analysis (x = 10 to 30)
• Score the remaining solutions Concepts against:
  – Support of High Scoring Perceptions
  – Support (or destruction) of Loops
  – Support of VOC
Case Study Result Samples

- **Short-term, Inexpensive, Easy**
  - surgeon to maintain a back fill list of non-critical cases
  - document the cost of a delay or nonproductive time and provide visual indicator
  - fill block time from the end to the beginning, release early start for others if not filled (fill the block backwards)
  - give surgeon an option for overbooking elective non-critical cases

- **Med-term, Mid-range cost and complexity**
  - concentrate high variability cases to one day or one room so other days/rooms are highly predictable
  - countdown on SMARTRACK board (visually demonstrate time remaining to on time start or on time close-delays) Can use color coding to signify delays, especially turnover
  - e-paging to doctors for case time update
  - segmentation of schedule by case type so all similar cases are done on the same day or in the same room

- **Long-term, Expensive, Complex**
  - patient navigator (concierge)-- gets patient through the process from the time the decision is made for surgery until they are discharged home
  - completely separate scheduling systems by service lines
  - operating on one side of room and prepping on the other side (sterile barrier)
  - absence of activity in an OR is an indication of schedule problems - motions sensors
  - dynamic configurable rooms that move as needed
  - RFID on surgeons, patients, gurneys, equipment to signal location in the building
  - operate in patient's inpatient room
Innomation, LLC
David Conley - Principal

• Education – BS Nuclear Engineering, MBA Finance, TRIZ L4

• Work Experience
  – USAF Philips Lab – R&D Officer
    • Plasma Physical
    • Space Based Nuclear Propulsion
  – Johnson and Johnson – Process Engineer
  – Phillips – Facilities Engineer
  – Lockwood Greene – Engineering Consulting
  – Intel Corporation – Engineering, Automation, Manufacturing, Finance, Management
    – Innomation LLC – Technical and Business Innovation Consulting

• Go to InnomationCorp.com for more information
Innomation, LLC
David Conley - Principal

Experience and knowledge converged into consultation services
Acknowledgements

• Thanks to Presbyterian Heath Services for their support of this project and the associated case study.
Back-Up Material

- 40 Principles with Business Examples
- Business Contradiction Matrix
40 Principles with Business Examples

- Gives business examples for TRIZ 40 Principles
- Available from InnomationLLC.com under About Us – Articles, Presentations and Materials
Business Contradiction Matrix

• Relates contradictory parameters to the 40 Principles
• Available form InnomationLLC.com under About Us – Articles, Presentations and Materials