



The Quick Reference Guide to TeamSTEPPS Action Planning

Step 1: Create a Change Team

Objective: To create a team of leaders and staff members with the authority, expertise, credibility, and motivation necessary to drive a successful TeamSTEPPS Initiative.

- Ensure key leadership representation: senior leadership, frontline leadership.
- Identify an Executive Sponsor.
- Ensure key expertise representation: clinical/technical, medical teamwork, process improvement and trending techniques.

Step 2: Define the Problem, Challenge, or Opportunity for Improvement

Objective: To specifically state the problem, challenge, or opportunity for improvement that will be targeted by your TeamSTEPPS intervention; and to identify the involved process.

- Identify a problem, challenge, or opportunity that you feel could be improved with enhanced medical teamwork.
- Identify the process during which the target problem, challenge, or opportunity occurs by stating what the process is, who is involved, and when and where it occurs.

Step 3: Define the Aim(s) of Your TeamSTEPPS Intervention

Objective: To succinctly state in measurable terms exactly what you hope to achieve with the TeamSTEPPS Intervention.

- For each aim, state in one sentence in measurable terms what you hope will be achieved, who will be involved (whose behavior will change), and when and where the change will occur.
- Ideally, define a team process aim, a team outcome aim, and a clinical outcome aim.

Step 4: Design a TeamSTEPPS Intervention

Objective: To design a TeamSTEPPS Intervention that will address your target problem, challenge, or opportunity and achieve your stated aims.

- Flowchart or map the process during which the problem, challenge, or opportunity occurs. Write the process steps as they currently occur, identifying who is doing what, when, with what tools.
- Study the process to identify risk points where things could go wrong and lead to a recurrence of the target problem.
- Identify team strategies and tools (e.g., brief, huddle, debrief, STEP, SBAR, and I PASS the BATON) that would eliminate the risk points and prevent the problem from recurring.



- Review the evidence base, brainstorm, and elicit input from key personnel to design your TeamSTEPPS Intervention. State what team tools and strategies will be implemented and who will use them, when, and where.
- Flowchart the redesigned process as it would look with the intervention in place to identify potential benefits and negative effects.
- Evaluate your intervention using the TeamSTEPPS Intervention Checklist, and then modify it if needed.

Step 5: Develop a Plan for Testing the Effectiveness of Your TeamSTEPPS Intervention

Objective: To develop a method to determine if your TeamSTEPPS intervention achieved your aims. Did it work?

For each aim, create a testing plan, including:

- Change Team member responsible for data collection, analysis, and presentation.
- A measure and target ranges for the measure.
- Study design (usually pre- and postintervention study).
- Sample (study group) or data source with comparison group.
- Methods for data collection, analysis, interpretation, and presentation.
- Timelines for baseline and for postintervention data collection and analysis.
- Resources required.

Step 6: Develop an Implementation Plan

Objective: Part A: To develop a plan for training your staff in the medical teamwork knowledge, attitude, and skills necessary to successfully implement your TeamSTEPPS intervention.

Part B: To develop a plan for putting your TeamSTEPPS intervention into place.

Part A: Develop a Plan for Medical Team Training

- Identify your Instructors, trainee audience(s), and their specific training requirements. Determine who needs to be trained on what team knowledge/skills and by when in order to achieve your aims.
- Develop a training plan for each trainee audience, including who will attend, what will be taught, when and where sessions will occur, and how training will be conducted (e.g., method of presentation, tools, supplies).
- Use TeamSTEPPS training materials that will best meet your audiences' training needs.

Part B: Develop an Implementation Plan for the TeamSTEPPS Intervention

- Ensure you have collected all baseline data before implementing the intervention.
- Identify the person(s) responsible for implementation.
- Determine how you will implement your intervention in order to achieve your aims. Identify who will use what team strategies and tools, when, and where.
- Create an implementation timeline.



Step 7: Develop a Plan for Sustained Continuous Improvement

Objective: To develop a plan for continuous process improvement with your TeamSTEPPS intervention, including plans for ongoing assessment of the effectiveness of the intervention, sustainment of positive changes, and identification of opportunities for further improvements.

- Develop a monitoring plan for ongoing assessment of intervention effectiveness, including measures and target ranges; data source; methods for data collection, analysis, and use for continuous improvement; and person(s) responsible.
- Develop a plan for sustaining and spreading positive changes, including rewards, feedback, integration, ongoing teamwork coaching, and sharing of lessons learned.

Step 8: Develop a Communication Plan

Objective: To create a communication plan targeting major stakeholders that will generate initial and ongoing support for your TeamSTEPPS initiative and promote the maintenance and spread of positive changes.

- Identify persons or groups whose support will be important for achieving your intervention aims and for maintaining positive changes. Consider organization and frontline leaders, staff directly involved in the intervention, patients, and other units affected by the intervention.
- Develop a communication plan for each identified group, including your goals for communication, who will get the information, what information you will communicate, and when and how you will communicate it (e.g., reports, presentations, e-mails).
- Identify Change Team member(s) responsible for implementation and oversight.

Step 9: Putting It All Together: Write the TeamSTEPPS Action Plan

Objective: To generate a written Action Plan, based on steps 1 through 8, which will function as your “How-To Guide” for every component of your TeamSTEPPS initiative.

If you completed each of the worksheets for steps 1 through 8, you have already written your TeamSTEPPS Action Plan. Ensure that your final Action Plan includes all of the following:

- Identification of the Change Team
- Identification of the problem, challenge, or opportunity that will be targeted by the TeamSTEPPS initiative
- Stated aims of your TeamSTEPPS intervention
- Detailed description of your intervention
- A plan for testing the effectiveness of your intervention
- An implementation plan for both medical team training and for your intervention
- A monitoring plan for ongoing assessment of the effectiveness of your intervention



- A communication plan to generate support for the TeamSTEPPS initiative and to promote maintenance and spread of positive changes
- Timelines
- Resources required

Step 10: Review Your TeamSTEPPS Action Plan With Key Personnel

Objective: To generate support and elicit ideas from major stakeholders and to identify barriers to program implementation.

- Ask key stakeholders to review your Action Plan and to provide input. Request that they identify any potential problem areas and offer solutions.
- Modify your Action Plan based on their input, as appropriate.



TeamSTEPPS Action Planning At-A-Glance

