

Tips for Success on an IHI Virtual Expedition

IHI Virtual Expeditions are designed to help multidisciplinary teams make rapid improvements in the areas of greatest concern to health care organizations today. Please consider these tips for success on an IHI Virtual Expedition to help your team make the most of this program:

Identify your Team

IHI Virtual Expeditions are designed for teams and open to anyone from your facility.

Multidisciplinary teams make for richer discussion and team experience – review the “Who Should Attend” section of the Expedition page for suggested team members to recruit.

- **Recruit team members.** Identify the key stakeholders for your improvement initiative. Invite representatives from each stakeholder group to join your team. A personal email, phone call, or conversation can help increase buy in for improvement efforts.
- **Add team members to the Expedition Email Listserv.** The listserv allows your team to join participant conversation and receive session information. To add team members, email info@ihi.org the Expedition name and your colleagues’ email addresses. Instructions for using the listserv will be sent to you two weeks prior to the first session.

Prepare to Use WebEx

Expedition sessions are hosted on WebEx, a web conferencing platform. WebEx technology specifications are included in your enrollment confirmation email. If you’re looking for more information connection, please bookmark [this page](#).

- **Join the Connection Test** if you’ve never connected to WebEx before. This is your opportunity to ensure that you are able to log in and are comfortable with the interface and functions. Details pertaining to the connection test are in your confirmation email.
- **Book a conference room.** Many teams find prefer to participate in the Expedition together. Choose a conference room that will fit your whole team comfortably, or consider going off-site so you aren’t pulled elsewhere throughout the session. Selecting a room with a phone line allows your team to join the audio by phone, which allows you to speak if you have any questions/comments, and is a more reliable connection than using audio broadcast through your computer speakers. If possible, book the room a few minutes prior to the start of the session so you have time to set up the WebEx. Similarly, book the room for a few minutes after it ends so your team can discuss the concepts presented, the action period assignment, and delegate tasks to team members. Compile any remaining questions your team has and send them to the Expedition listserv for feedback from faculty and other teams.
- **Identify Team Roles.** Choose one team member who will be responsible for setting up the WebEx and audio prior to the start of each call. Designate another team member who will be responsible for chatting in for the group throughout the call.
- **Connect with your IT team** in case they’re needed.

Set Up for Success

There are a number of actions you can take to set your team up for success.

- **Review the [Model for Improvement \(MFI\)](#) with your team.** During an Expedition, participants are taught the MFI, a simple yet powerful tool for accelerating Improvement. It serves as the foundation for the Expedition and improvement experience. Nail down the concepts by watching [these](#) whiteboard videos before the Expedition begins.
- **Set goals.** Align your team's improvement goals with your organization's overall aims and make certain your goals are clear and relevant to both individuals and groups.
- **Build relationships among team members.** Take the time to have your team members get to know each other professionally and as individuals. This will allow you to understand each other's perspectives, constraints, and strengths.
- **Set up regular team meetings to accelerate your progress.** Begin each team meeting by reviewing the team's progress toward your goals. Keep your goals and how to meet them as the team's primary focus. Assign a project manager to drive the tasks associated with your improvement work and track progress toward your goals.

Stay Connected Between Sessions

The Action Period between each session is where the improvements begin! Stay connected to the program, and remember that your team is not your only resource — there are many other teams on your Expedition with you that are working toward the same goals, and the IHI faculty is always willing to answer questions.

- **Complete the assignments during the action periods.** After each Expedition session, faculty will lay out a set of activities for teams to complete before the next session. Completing these assignments should not take more than an hour of additional work during the two week time period between sessions and will strengthen your learning.
- **Review the materials after the session to reinforce key concepts.** The materials and connection instructions are sent over the listserv the day before each session. The day following the session, a recording link will be made available over the listserv. The program materials are also available on the MyIHI section of your IHI user profile.
- **Remember to orient new members to the improvement team.** Addressing turnover as it happens helps to ensure continued success.
- **Post questions and comments to the listserv.** Expedition listservs are invaluable resources for feedback. After you meet with your team, decide on a few questions or comments about concepts and action-period assignments to pose to the other participants.

Share Your Learnings and Successes

Expeditions take time and dedication! Be sure to share your learnings and successes with others.

- **Share news about (and get recognition for) your team's work.** For example, offer a lunch-and-learn on your early successes or contribute to your organization's newsletter.
- **Share your successes with the IHI team for recognition during the Expedition sessions.** If you don't want to wait for the session, share via the Expedition listserv. Acknowledge individual accomplishments as well as those of the group.
- **Use your data.** Combine storytelling with your data to engage both the heads and hearts of others. Discuss and learn together how data can help you make a change.
- **Feature your learnings on the [IHI Improvement Blog](#).** If your team sees growth, improvement, or success due from time spent on an Expedition, we would love to hear about your goals, strategies, improvements, lessons learned— so we can share with others.