Smart Goals 2025

### \*\*SMART Goal for Ugochi Ndubuisi\*\*

\*\*Target Date\*\*: 10/17/2025

\*\*Primary AOP Metric\*\*: Turnaround Time (TAT) & Productivity (PPH)

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#### \*\*SMART Goal Statement\*\*

\*\*Specific\*\*:

Reduce lab staff idle time from 50% to 30% and increase the percentage of staff achieving ≥6 PPH (patients per hour) from 33% to 50% by implementing Microsoft ecosystem workflows (Power Apps + Power Automate + Teams) to automate pending inquiry checks, inventory management, and dynamic scheduling.

\*\*Measurable\*\*:

1. \*\*Idle Time\*\*: Decrease average idle time from 50% to 30% (Power BI dashboard).

2. \*\*Productivity\*\*: Increase staff with ≥6 PPH from 33% (67/202) to 50% (101/202).

3. \*\*TAT\*\*: Achieve 95% of results completed in-lab-to-result within 45 minutes (current: untracked).

4. \*\*Workflow Compliance\*\*:

- 100% of pending inquiries resolved within 1 hour of assignment.

- 0 incidents of reagent borrowing from Largo Lab.

\*\*Achievable\*\*:

- Uses existing Microsoft licenses (no new costs).

- Power Apps/Power Automate workflows built in 2 weeks (by 9/11/2025).

- Staff trained via Power Pages (self-paced modules).

\*\*Relevant\*\*:

- Directly addresses AOP goals:

- Reduces idle time → Improves PPH → Lowers patient wait times.

- Automates TAT-critical tasks (pending inquiries, inventory) → Ensures 95% results in ≤45 mins.

- Aligns with Largo Lab’s productivity crisis (67% of staff at <6 PPH).

\*\*Time-bound\*\*:

- \*\*9/8/2025\*\*: SMART goal finalized in tracker.

- \*\*9/11/2025\*\*: Initial action steps completed (ready for Thursday report).

- \*\*10/17/2025\*\*: Full implementation and goal measurement.

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### \*\*Initial Action Steps (Complete by 9/11/2025)\*\*

1. \*\*9/8/2025\*\*:

- Finalize SMART goal in shared tracker.

- Create SharePoint database for shift schedules and inventory tracking.

2. \*\*9/9/2025\*\*:

- Build Power App "Inventory Hub" prototype (real-time stock view + 1-click reorder).

- Integrate Power Automate flow for low-stock alerts.

3. \*\*9/10/2025\*\*:

- Develop Power App "Break Tracker" (check-in/out + compliance alerts).

- Sync with Power BI for idle time monitoring.

4. \*\*9/11/2025\*\*:

- Train 5 pilot staff on Power Apps (focus: inventory requests + break logging).

- Deploy Teams command center ("Lab Operations Hub" tab).

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### \*\*Weekly Reporting Plan (Thursday Meetings)\*\*

| \*\*Date\*\* | \*\*Reporting Focus\*\* | \*\*Metrics Tracked\*\* |

|------------|------------------------------------------------------|--------------------------------------------------|

| 9/12/2025 | Pilot staff feedback on Power Apps | - % of low-stock alerts resolved in 24 hrs |

| 9/19/2025 | Idle time reduction (Power BI) | - Avg. idle time (target: ≤45%) |

| 9/26/2025 | PPH improvement (productivity report) | - % staff at ≥6 PPH (target: 40%) |

| 10/3/2025 | Pending inquiry backlog (Planner/Power BI) | - Overdue inquiries (target: ≤3/day) |

| 10/10/2025 | TAT compliance (LIS data) | - % results in ≤45 mins (target: 90%) |

| 10/17/2025 | Final goal review | - All metrics vs. SMART targets |

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### \*\*Largo Lab Goal (Site-Level)\*\*

\*\*Target Date\*\*: 10/17/2025

\*\*Primary AOP Metric\*\*: Wait Time & TAT

#### \*\*SMART Goal Statement\*\*

\*\*Specific\*\*:

Achieve 85% of patients seen within 15 minutes and 95% of results completed in-lab-to-result within 45 minutes by eliminating workflow bottlenecks (pending inquiries, inventory gaps) and reducing staff idle time from 50% to 30%.

\*\*Measurable\*\*:

1. \*\*Wait Time\*\*: 85% of patients seen in ≤15 mins (current: untracked).

2. \*\*TAT\*\*: 95% of results in ≤45 mins (current: untracked).

3. \*\*Idle Time\*\*: Reduce from 50% to 30% (Power BI).

4. \*\*Productivity\*\*: Increase staff with ≥6 PPH from 33% to 50%.

\*\*Achievable\*\*:

- Leverages Ugochi’s Microsoft workflows (no duplication).

- Focus on Largo-specific IOU tracking (eliminate borrowing).

\*\*Relevant\*\*:

- Directly impacts AOP targets: Wait time and TAT.

- Addresses Largo’s role as "lender" in inventory IOUs.

\*\*Time-bound\*\*:

- Aligns with Ugochi’s timeline (10/17/2025).

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### \*\*Why This Works\*\*

- \*\*Ugochi’s Goal\*\*: Fixes root causes (idle time, workflow gaps) to drive PPH/TAT.

- \*\*Largo Lab Goal\*\*: Targets site-specific AOP metrics using Ugochi’s solutions.

- \*\*Tight Timeline\*\*: 6 weeks (9/8–10/17) with weekly checkpoints.

- \*\*AOP Alignment\*\*:

- ↓ Idle time → ↑ PPH → ↓ Patient wait times.

- ↓ Inventory delays → ↑ TAT compliance.

Both goals are \*\*interconnected\*\*, \*\*measurable\*\*, and \*\*achievable\*\* using Microsoft tools—ready for the tracker by 9/8/2025.

Of course, Ugochi. Here is a filled-out SMART Goal for you, based on the Largo Lab's critical needs and the specific directives in your email. This goal directly addresses the key AOP metrics and the productivity data you've been given.

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### \*\*SMART Goal Tracker for Ugochi Ndubuisi\*\*

\*\*Project Summary:\*\* To improve Largo Lab's operational efficiency and patient wait times by systematically addressing the root causes of low productivity and high idle time, as revealed in the August productivity report.

\*\*AOP Target for SMART Goal:\*\* Improve wait time to meet >60% members seen within <5 minutes.

\*\*SMART Goal:\*\* Increase the percentage of phlebotomists at Largo Lab with a productivity rate of >6 Patients Per Hour (PPH) from 33% (67 out of 202) to 50% by October 17, 2025, by implementing standardized workflows, individual performance feedback, and reducing time spent on non-phlebotomy tasks.

\*\*Project Start Date:\*\* 09-SEP-2024

\*\*Project End Date:\*\* 17-OCT-2025

\*\*Project Owner:\*\* Ugochi Ndubuisi

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\*\*Key Completed Activities and Accomplishments\*\*

\*(To be completed by Thursday, 9/11/2024)\*

| Key Activities Accomplished | Date Done | Comments |

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| Analyzed August productivity data to identify bottom performers (<6 PPH) and top performers (>7 PPH). | 09-SEP-2024 | Baseline: 67% of staff (135/202) are below 6 PPH. |

| Conducted initial observations to identify specific "poor performance behaviors" and workflow deviations. | 10-SEP-2024 | Focused on staff with high idle time and low encounter volume. |

| Scheduled one-on-one meetings with the first 5 identified low performers to review productivity data. | 11-SEP-2024 | Prepared for performance management conversations. |

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\*\*Next Actions:\*\*

\*(Become your accomplishments for the next update)\*

| Next Steps | Target Date | Comments: Risks, Challenges, or Barriers |

| :--- | :--- | :--- |

| Finalize and distribute a clear, one-page "Standard Workflow" checklist for phlebotomists. | 13-SEP-2024 | Ensure it aligns with policy and is easy to follow. |

| Complete first round of one-on-one meetings with all 20 lowest-performing staff. | 20-SEP-2024 | Document conversations and create individual improvement plans. |

| Develop a simple Power App for staff to self-report reasons for non-productive time (e.g., inventory search, instrument issues). | 27-SEP-2024 | This data will help address systemic issues causing idle time. |

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\*\*Action Plan:\*\*

| Overall Action Plan | Target Date | Comments |

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| 1. \*\*Standardization:\*\* Create and train all staff on a standardized phlebotomy workflow to eliminate behavioral variations. | 30-SEP-2024 | |

| 2. \*\*Accountability:\*\* Implement weekly productivity reviews with team leads, using the data to coach low performers and recognize high performers. | Ongoing | |

| 3. \*\*Systemic Fixes:\*\* Use data from the self-reporting app to address top causes of idle time (e.g., fix inventory system, streamline pending inquiries). | 15-OCT-2024 | |

| 4. \*\*Monitor & Sustain:\*\* Track the monthly PPH distribution to ensure progress is sustained and the 50% target is met. | 17-OCT-2025 | |

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\*\*Key Issues, Risks & Barriers:\*\*

\* \*\*Staff Resistance:\*\* Staff may resist changes to their routine or be defensive about performance feedback.

\* \*\*Systemic Barriers:\*\* Idle time may be caused by factors outside phlebotomists' control (e.g., slow computers, frequent call-offs, needing to search for supplies). The self-reporting app is crucial here.

\* \*\*Time Investment:\*\* Conducting individual meetings and coaching requires a significant time commitment from management.

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\*\*Measures and Metrics:\*\*

| Metric | Baseline (Aug) | Target | Prior Measure | Current Measure |

| :--- | :--- | :--- | :--- | :--- |

| % of Phlebotomists >6 PPH | 33% (67/202) | 50% | | |

| % of Phlebotomists <6 PPH | 67% (135/202) | <50% | | |

| \*\*This metric directly influences the AOP wait time goal of >60% of patients seen in <5 minutes.\*\* | | | | |

### \*\*How This SMART Goal Connects to the Larger Plan\*\*

This goal is the perfect entry point for implementing the "Largo Lab Operations Command Center" we designed. The \*\*Power App for self-reporting idle time\*\* will provide the data to justify and propel the other projects:

\* \*\*Inventory:\*\* If techs report "searching for reagents" as a reason for idle time, you have data to push the Inventory Tracker.

\* \*\*Pending Inquiries:\*\* If "researching incomplete tests" is a cause, it strengthens the case for the Pending Inquiry Manager.

\* \*\*Scheduling:\*\* If call-offs are disrupting workflow, the Shift Board becomes the solution.

You are not just improving a number; you are diagnosing the lab's operational health and implementing the cure. This is a strong, data-driven SMART goal that any director would support.  
  
Based on our extensive discussions about your lab's challenges and the automation solutions we've designed, here's your completed SMART Goal tracker:

**SMART Goal Project Summary**

**Project Owner:** Ugochi Ndubuisi, Laboratory Operations Manager  
**Project Start Date:** September 8, 2025  
**Project End Date:** October 17, 2025  
**AOP Target for SMART Goal:** Achieve 95% of results completed from in-lab to result within 45 minutes

**SMART Goal Statement**

**Specific:** Implement automated Microsoft ecosystem workflow to increase lab TAT compliance from current 30-50% to 85% within 6 weeks  
**Measurable:** Track TAT performance, QC compliance (target: 100%), break violations (<5/day), and staff idle time reduction to <35%  
**Achievable:** Using existing Microsoft infrastructure with Power Apps, Power Automate, and Teams integration  
**Relevant:** Directly addresses AOP TAT metric of 95% results within 45 minutes and productivity concerns (67% of staff <6 PPH)  
**Time-bound:** Full deployment by October 17, 2025 with weekly milestone tracking

**Action Plan**

| **Target Date** | **Action Plan Activities** |
| --- | --- |
| **September 11** | Deploy Power Apps QC tracking system and break management app |
| **September 18** | Implement automated TAT monitoring with Teams alerts |
| **September 25** | Launch inventory management system and pending test workflows |
| **October 2** | Deploy staffing automation for call-outs and coverage |
| **October 9** | Integrate Power BI dashboards and performance scorecards |
| **October 17** | Complete system optimization and achieve 85% TAT target |

**Key Completed Activities and Accomplishments**

* Analyzed current performance data showing TAT at 30-50% vs 95% target
* Identified root causes: poor evening shift leadership, lack of QC accountability, inefficient workflows
* Designed comprehensive Microsoft ecosystem automation solution
* Documented current productivity issues (146/243 staff >50% idle time)
* Created implementation roadmap with phased deployment approach

**Next Actions**

1. **Week 1 (Sept 11):** Configure Power Apps for QC tracking and break management
2. **Week 2 (Sept 18):** Set up Power Automate workflows for TAT alerts and escalation
3. **Week 3 (Sept 25):** Deploy inventory alerts and pending test monitoring
4. **Week 4 (Oct 2):** Implement automated staffing coverage system
5. **Week 5 (Oct 9):** Launch performance dashboards and individual scorecards
6. **Week 6 (Oct 17):** Final optimization and target achievement validation

**Key Issues, Risks & Barriers**

**Risks:**

* Staff resistance to new accountability measures and automated tracking
* Technical integration challenges between existing systems (Epic Beaker, Qmatic, Bio-Rad Unity)
* Potential workflow disruption during implementation phase

**Barriers that Leadership Can Resolve:**

* Need immediate authority to remove Sam from lead tech role based on performance data
* Require approval for progressive discipline enforcement using automated documentation
* Request IT support for Power Platform configuration and API connections
* Budget approval for Power Platform licensing (~$1,520/month for enhanced features)

**Critical Success Factors:**

* Management commitment to enforce new policies with automated evidence
* Swift implementation without gradual rollout to prevent system gaming
* Clear communication that automation is for quality improvement, not job elimination

**MAPMG/Executive Support Needed:**

* Endorsement of data-driven performance management approach
* Support for restructuring evening shift leadership
* Backing for technology investment ROI (projected 75% error reduction, 40% TAT improvement)

**Comments: Risks, Challenges, or Barriers**

The current productivity data showing 67% of staff below 6 PPH and 42% below 5 PPH indicates systemic workflow issues rather than individual performance problems. The automation solution addresses root causes through:

* Eliminating manual processes that create delays
* Providing real-time visibility into bottlenecks
* Creating objective accountability measures
* Enabling proactive rather than reactive management

Success depends on leadership support for swift implementation and consistent enforcement of new standards backed by automated documentation.