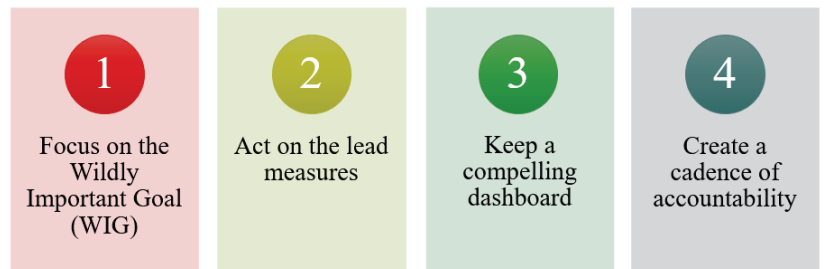# Using 4DX to support improvement efforts

Continuous quality improvement (CQI) is a process that involves defined steps to identify, address, and support progress on key challenges. Even with a clear process, however, teams may struggle to maintain focus on one challenge at a time and stay on track to achieve improvement goals. The Four Disciplines of Execution (4DX) is a framework for effectively executing on your team's key goals and can be applied to support your CQI efforts (McChesney et al 2012).

The 4DX framework consists of four key disciplines (*see Figure 1).* This tip sheet explores each discipline and offers tips on how to apply 4DX to your CQI efforts. Be sure to check with your Family Assistance Program Specialist (FPS) before making any changes to your program design based on CQI and 4DX processes.

Figure 1: The Four Disciplines of Execution

1	2	3	4
Focus on the Wildly Important Goal (WIG)	Act on the lead measures	Keep a compelling dashboard	Create a cadence of accountability

Discipline 1: Focus on the Wildly Important Goal (WIG)

A WIG is the most important thing a team is trying to accomplish through CQI. WIGs should be realistic to achieve but also important and motivating enough to generate enthusiasm from staff. Ideally, program leaders should use a collaborative process to identify the program's next WIG. This could be as simple as gathering feedback during a staff meeting or using a more structured activity (*see Box 1).*
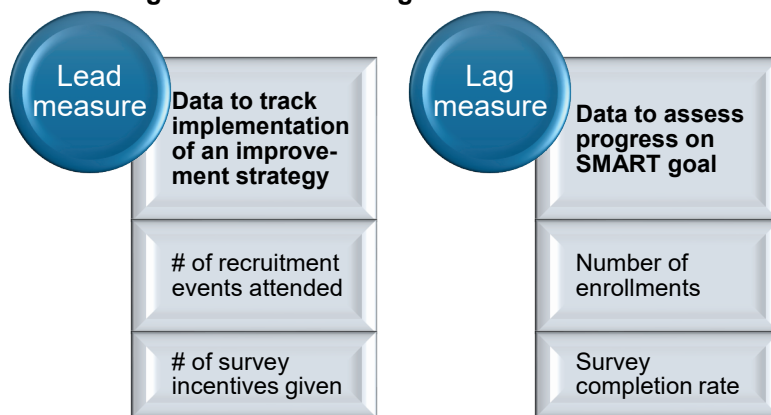
How does a WIG differ from a SMART goal? CQI involves setting and working toward SMART goals. WIGs and SMART goals are directly related – a SMART goal makes your WIG actionable. For example, your WIG could be to increase engagement in your school-based workshops. To assess progress on the WIG, you need to create a SMART goal that defines what success looks like (e.g., By the start of next semester, we will see an increase in the number of students participating in our classes from 30 percent to 60 percent).

Box 1. Gather feedback to identify your WIG

If you have a large team or are concerned about hearing all voices, consider using a structured activity to understand what challenges staff feel are most pressing to address. For instance, Rose, Bud, Thorn and Plus/Delta are both activities in which staff brainstorm individually what is going well and what needs to improve. Then, the group discusses all the ideas and prioritizes the most important challenge to address through CQI.

Discipline 2: Act on the lead measures

Your team should regularly monitor the most essential lead and lag measures to assess progress toward your WIG. (*See Figure 2.*) **Lag measures** are the desired outcomes of your efforts to achieve your WIG. You often do not see immediate progress on your WIG, so lag measures are useful for monitoring long term success, but not for determining whether you are on the right track amid an improvement effort.

Figure 2: Lead and Lag measures

Lead measure	Lag measure
Data to track implementation of an improvement strategy	**Data to assess progress on SMART goal**
# of recruitment events attended	Number of enrollments
# of survey incentives given	Survey completion rate

Lead measures track the activities and efforts of staff. These are the measures that staff feel empowered to influence. For instance, if your program is aiming to enhance engagement in your school-based workshops, staff may not know what they can do, personally, to see a change in that outcome. However, if the program decides a strategy for enhancing engagement will be for facilitators to implement at least one energizer per class, they can commit to carrying out that strategy and assess their progress in doing so. Lead measures are useful for troubleshooting during a road test. They provide near immediate feedback about whether staff are implementing the improvement strategy as expected and, if not, signal the need for adjustments to better support staff.

Discipline 3: Keep a compelling dashboard

The purpose of a 4DX dashboard is to help the team stay focused and motivated to achieve the lead and lag measures that result in the WIG. Research shows that people tend to act differently when "keeping score," as they are motivated to act by seeing their performance compared to others or to a set benchmark (Kahneman 2017). A dashboard allows staff to see how their efforts compare to their goals.

A good dashboard is:

Accessible. Accessibility means that the dashboard is easy for everyone to view (e.g., in an Excel file that is updated and emailed to relevant staff each week; in an automatically refreshing dashboard in the agency's internal data system.) The dashboard should also be easy for all staff to understand and interpret.

Motivating. Include your WIG on the dashboard. Make sure to display the baseline, or where your team was at the start, as well as progress since the team started its improvement effort. You may not update progress on the WIG every week, but it can be motivating to see how far you've come over time. (*See Box 2.*)

Actionable. A 4DX dashboard should be designed to inform staff actions—this will help your team successfully implement your road test and draw useful insights from it. The dashboard should display lead measures directly related to the strategy you are testing, which you designed to influence your WIG. Break down targets by staff, partner, or site to make lead measures more actionable. Individuals can see how close they got to reaching their own goal and whether others
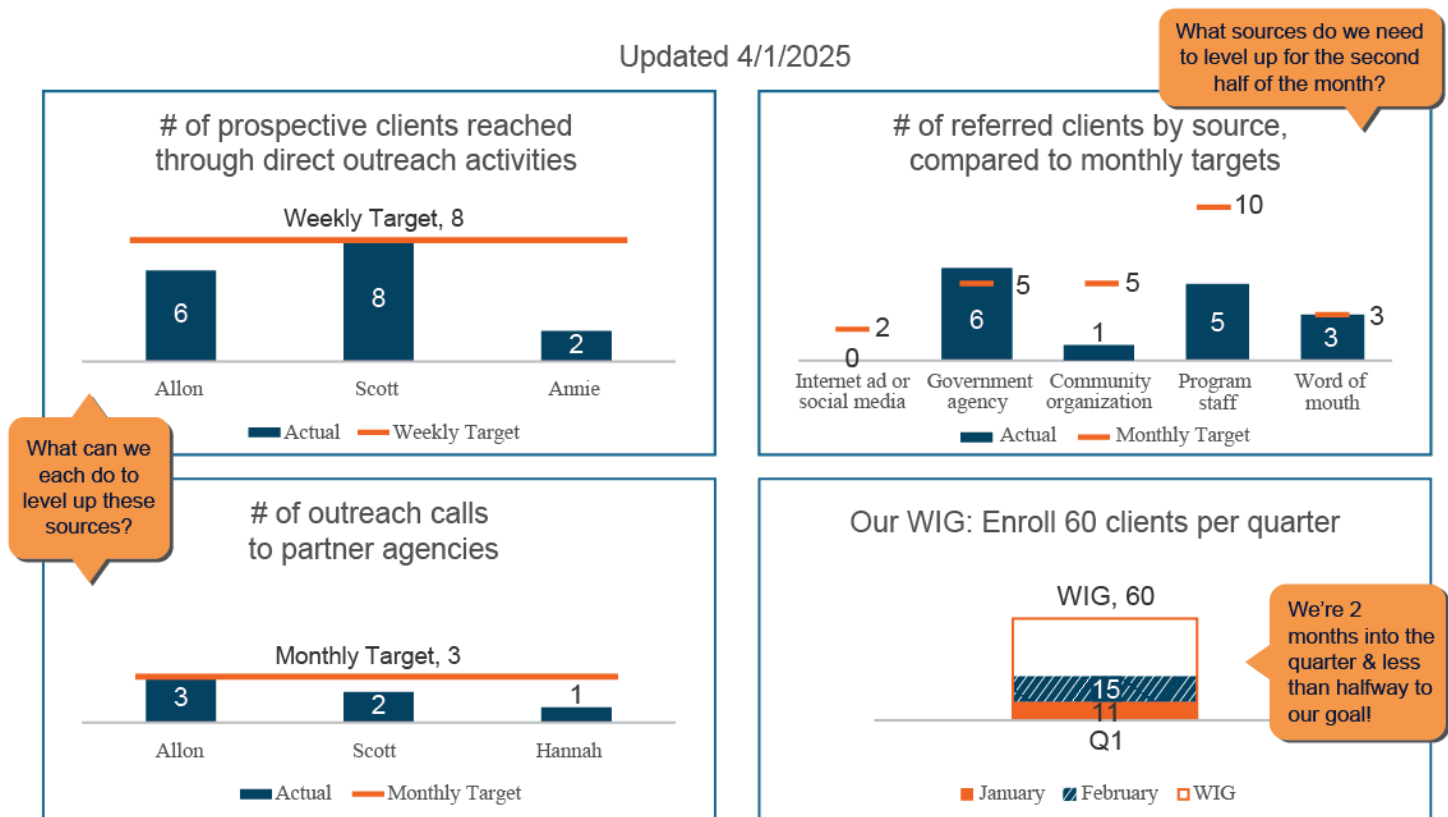
> **Box 2. Create a motivating dashboard**
>
> Think about what to include on your dashboard. For instance, if your WIG is to enroll 60 clients per quarter, you will only be able to track progress toward that WIG each quarter. In addition to including your lead measures, you can monitor interim goals to support the WIG, such as increasing partner referrals to the program from 8 to 15 per month across partners. You can track and display progress toward this goal monthly, and it supports progress on the WIG.

reached theirs. Ideally programs would use this information to foster collaboration and improvement rather than competition. For example, if each of your recruiters has a goal of reaching 10 prospective participants in a given week, those who met the goal can share advice with those who did not.

When creating a dashboard, use a collaborative approach. Ask staff which metrics would be most motivating to display on a dashboard; how they would prefer to access the dashboard; and whether the way metrics are displayed is clear and understandable. See Figure 3 below for an example dashboard. Keep in mind that a useful dashboard is always a work in progress. As staff start to use the dashboard, check in from time to time to request their suggestions for improvement.

Figure 3: Sample dashboard and questions for reviewing

Maintaining your dashboard. Once your team has co-created a dashboard, you'll need to maintain it to keep it relevant and useful for informing actions. If you can maintain a real-time dashboard, that is the gold standard so staff can always be informed about where they are in relation to their goals. If you need to manually maintain your dashboard, you may aim for weekly or biweekly updates. Designate one person to be responsible for gathering data for the dashboard and updating it at specified intervals. Remember, the dashboard will be easier to update if you limit the number of metrics displayed to only the most essential.

Make sure you regularly review the dashboard and discuss challenges and successes to achieving goals with your CQI team. These reviews should happen with staff responsible for implementing strategies so that the team can share barriers to reaching goals, draw on the team for help, and focus in on the key lead measures for driving success toward your WIG. See Discipline 4 below for more suggestions on using WIG sessions to review your dashboard.

Discipline 4: Establish a cadence of accountability

Your team should hold frequent WIG sessions, using a structured agenda to review progress towards your WIG. There are two primary purposes to holding WIG sessions:

To reinforce the importance of the WIG. When staff are busy putting out daily fires, it's easy to lose sight of the program's most important improvement goal. WIG sessions can help staff maintain focus on the most important issue.

To establish a cadence of accountability for progress toward the WIG. Commitment setting is key to WIG sessions. Each person sets a commitment to achieve tangible actions that support progress toward the WIG, and to report back at the next WIG session.

WIG sessions are most useful during CQI road testing and monitoring. This is where the CQI team has specified a strategy to tackle a challenge. Staff involved with implementing the strategy should meet frequently to ensure the work on the ground keeps moving forward.

WIG sessions should be:

Frequent but brief. WIG sessions during the road-testing phase may be as frequent as daily but could also be weekly or biweekly. They should be efficient (~20 minutes or less).

Motivating. WIG sessions should be collaborative and celebratory. If someone achieves an individual goal, celebrate it as a group. If someone fails to meet their goal, others in the meeting can help them brainstorm how to overcome barriers they may have faced.

Structured. WIG sessions should have a predetermined agenda (*see Figure 4*). Keep WIG sessions short and to the point by sticking to the agenda. Review the dashboard and discuss successes as well as barriers to reaching goals (see Figure 3 for example questions). Report on commitments made during the prior WIG session and make new commitments for the week ahead. Commitments should be actions an individual staff member can take in their day-to-day work that contribute to the WIG. To help staff develop a goal, have them answer the question: *What can I do this week that will have the biggest impact on the WIG?*

Figure 4: WIG session agenda

Agenda – WIG session 4.15.23

1. Review the dashboard; share successes and challenges
2. Report on prior week's commitments
3. Clear the path for new commitments

WIG: Enroll 60 clients per quarter by June

A tool to support CQI

4DX is not a replacement for the key steps in the CQI cycle. It is a framework to help your team prioritize and make progress on key improvement goals, even when staff are pulled in different directions and face time constraints. Use 4DX to enhance each step in your CQI cycles, and especially during road testing.

Revisit these HMRF CQI TTA office hours on the 4DX framework:

- [October 2022 CQI office hours: Maintaining focus on your priority challenge](#)

- [December 2022 CQI office hours: Building a compelling 4DX dashboard](#)

- [January 2023 CQI office hours: Establishing a cadence of accountability](#)

For more information on 4DX outside of a CQI context, see: https://resources.franklincovey.com/mkt-4dxv1/the-4-disciplines-of-execution

Sources:

Kahneman, Daniel. "Thinking Fast and Slow." London: Penguin Books, 2011.

McChesney, C., S. Covey, & J. Huling. The 4 Disciplines of Execution: Achieving Your Wildly Important Goals. New York: Free Press, 2012.