

OPTIMIZING LEARNING PROGRAMS WITH MICROSOFT 365 AND LEAN PRINCIPLES

A lean, technology-based model for scaling nursing professional development operations with existing resources

Melodie Daniels, RN, PhD, CNS, NPD-BC (Melodie.Daniels1@Sharp.com) | Anela Wu, MS, LSSGB | Lisa Simpson BS, LSSYB | Sara Cardenas-Krok LSSYB | Christopher Grey LSSYB | Sharp HealthCare

SILENT PRESENTER BAR

STATEMENT OF THE PROBLEM

Healthcare learning programs are often fragmented across departments, resulting in inefficiencies, duplication, and limited scalability.

PROBLEM

- Multiple learning functions operated independently with significant variability.
- High workload burden alongside reduced staffing and financial resources.
- Duplication and limited scalability across departments.

PURPOSE

Consolidate fragmented learning functions into a centralized department and redesign processes with Lean Six Sigma and Microsoft 365 tools to improve efficiency, standardization, and scalability.

METHODOLOGY

A quality improvement (QI) initiative in a large integrated healthcare system consolidated learning functions into a centralized department. Lean Six Sigma guided process redesign, with iterative review cycles and stakeholder feedback informing implementation.

APPROACH

- Map workflows and identify inefficiencies using Visio.
- Apply Lean Six Sigma to eliminate waste and standardize processes.
- Automate tasks and monitor outcomes with Microsoft 365 tools.
- Consolidate functions into a centralized learning department.

MEASURES

- Process efficiency and turnaround
- Reduction in duplication and manual tracking
- Staff satisfaction
- Learner outcomes and cost savings

PRACTICE RELEVANCE

This model shows that nurse leaders and professional development teams can drive large-scale structural transformation with accessible technologies—improving efficiency, transparency, and data-driven decision-making across similar healthcare systems.

MAIN TAKEAWAY

A low-cost model built on **existing Microsoft 365 tools** consolidated fragmented functions, **eliminated waste and standardized processes**, and enabled **scalable processes** despite fewer staff and reduced budgets.

Built from existing enterprise tools: SharePoint + Power Apps + Power BI + Visio

LEAN TECHNOLOGY MODEL

1

Map

Visualize current work

2

Streamline

Remove waste and duplication

3

Automate

Standardize repeatable steps

4

Scale

Increase capacity and responsiveness

EXPECTED OUTCOMES

Efficiency

Fewer manual handoffs and less duplicated work

Quality

Clearer workflows and consistent documentation

Experience

More responsive support for staff and learners

Scalability

Higher program volume without equivalent staffing growth

SCAN QR CODE FOR ADDITIONAL DETAILS =>

AMMO BAR

M365 TOOLKIT

- SharePoint: centralized content and coordination
- Power Apps: standardized data collection and workflows
- Power BI: outcome monitoring and data visibility
- Visio: workflow mapping and standardization

PROCESS IMPROVEMENT LOGIC

Before

Fragmented functions
Manual tracking
Variable processes

After

Centralized department
Automated workflows
Standardized processes

FRAMEWORKS

- Lean Six Sigma: eliminate waste and standardize high-volume work.
- Quality Improvement: iterative review cycles and stakeholder feedback.
- Microsoft 365: SharePoint, Power Apps, Power BI, and Visio.

KEY CONTRIBUTION

A low-cost, technology-enabled model that leverages existing enterprise tools instead of new systems—eliminating waste, reducing redundancy, and improving coordination and efficiency despite fewer staff and reduced budgets.

RECOMMENDATIONS

- Evaluate long-term staff satisfaction.
- Track learner outcomes.
- Measure cost savings.
- Explore scalability across multi-site systems.
- Integrate emerging AI-enabled tools.

SELECTED REFERENCES

Hoelscher & Pugh, 2025
Jensen, Bickett, & Zidek, 2024
Better Poster method: Mike Morrison