

Who is in the room?

Educators

Others?

Phlebotomists

MLS

MLT

Students

Administrators



Building a Successful Patient and Family Experience Initiative:

Proven Results, Powerful Outcomes

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Agenda

- Purpose
- Process
- Results
- Do it!



Objectives

At the conclusion of this presentation, participants will be able to:

- 1) Recognize benefits of a purposeful patient and family experience initiative
- 2) Identify quality indicators of a successful patient and family experience initiative
- 3) Summarize key steps to create a meaningful patient and family experience initiative in their own lab



Defining Patient Experience

- “Everything we say and do that affects our patients’ thoughts, feelings, and well-being.”
— Mark A. Rudolph, MD, Society of Hospital Medicine

The sum of all interactions, shaped by an organization’s culture, that influence patient perceptions across the continuum of care.

— The Beryl Institute



Why invest in a Patient Experience Initiative?

PURPOSE



Why I Chose the Healthcare Field



- To make a positive difference in the lives of others
- With great customer service, you’re not only impacting the patient, but their family too!



Why Create a Pt. Exp. Program?



- ↑ Employee engagement
- Patients deserve our best
- Competitive edge in the healthcare market
- Insurance incentives
- Consistent experience across organization
- Builds teamwork
- Develops work culture



Steps to success

PROCESS

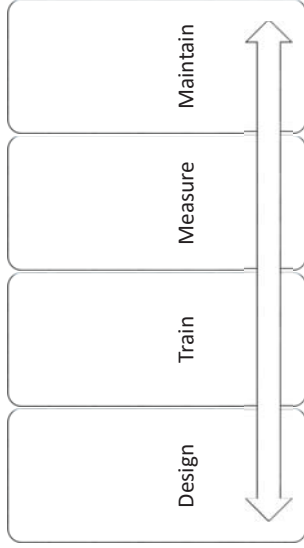


Background

- Initiatives first started in clinics with providers
- Pharmacy and ER
- May, 2014 – Lab pilot
 - Initially led by outside consultant
- March, 2015 – Hospital lab implementation
- Fall, 2016 – Clinic lab implementation



Process



Audience Participation Needed!

- Who will volunteer to be my patient?
 - Don't worry... no blood will be drawn! 😊



Foundation - Top 12 Behaviors

1. Offer a warm greeting
2. Acknowledge patient, introduce yourself, smile, apologize if patient kept waiting
3. Focus on the patient, face them and make eye contact
4. Make the personal connection, be friendly, break the ice
5. Listen and don't interrupt patient, respect privacy
6. Paraphrase patient's story to verify understanding and identify top priorities
7. Display empathy, compassion, and personal manner
8. Use key words to engage the patient
9. Thoroughly explain what is happening, give time frame if possible
10. Ask if patient or family needs more information and what concerns they have
11. Summarize while avoiding medical terms
12. Talk up your team, thank the patient, and deliver a warm close

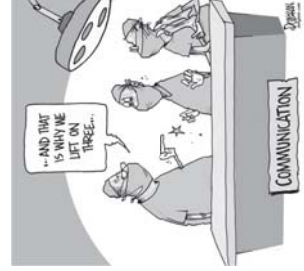


Design Team

- Ideas from key stakeholders
- Frontline staff involved = ↑ ownership
- Training tools reflect:
 - Site's unique culture
 - Patient population served
- Recruit early adopters



Think Out Loud and Explain



- What's obvious to you is not always obvious to the patient
- Explain what you're doing and why
- Over-communicate
- Patient stays confident instead of becoming concerned



Not your Average Small Talk

- Engaging topics to help distract patient
- **Inpatient Ideas:** Personal items in room, View outside, Visitors, Pets
- **Outpatient Ideas:** State Fair, Olympics, Vacations, Weekend Plans
- Have a go-to topic for when a patient is very nervous



Sample of Handout Material

9. Give information as you go (think out loud) and thoroughly explain what you are doing. Use some frame if possible (A-List - Duration, Explanation)

- Inform patient, "Someone will be out to get you shortly. Please have a seat in the waiting room."
- Name your process, "I am going to move your arm - let me know if you are uncomfortable. I will be using a small amount of numbing cream on your arm. I will be using a small amount of numbing cream on your arm. I will be using a small amount of numbing cream on your arm."
- After that...
 - which tube you're on or for a Brevibloc but don't stop them if they can do that too. Tell in case you get the wiggles.
 - If you need help holding a child, say, "This is my friend -name-. She is going to help you stay still."
 - If you need help holding a child, say, "This is my friend -name-. She is going to help you stay still."
- Further down, check back with the patient, "There are a patients ahead of you. It might be a few minutes. Will you still be able to wait? I will contact you if it will be longer than that. Do you need anything else now?"
- When you're done, "Would you prefer to come back another time?" Always give them an option to come back. Inform patient of next steps: "Please take a seat in our waiting room and we will call you."



Initial Training

- Mandatory – manager → newest employee
- Credible speaker
- Shared experience
- Establishes importance
- Start practicing behaviors right away



Measure Progress

- Initial self evaluations
- Establish personal goals
- Supervisor supports and coaches individuals
- Do second self-evaluation after 6 months
- Give patient surveys once a month



Giving Surveys



- Invitation matters
- Give to every patient
 - Don't cherry-pick
- Paper vs. Electronic
- Inpatient vs. Outpatient



Self Evaluation

Mark box below: * (Always, Usually, Sometimes, Never) demonstrate this behavior*

Behavior	Date:	Rating
	(A, U, S, N)	(A, U, S, N)
1. Offer a warm greeting, knock, wait for a response		
2. Acknowledge patient, introduce yourself (AIDET), smile, apologize if patient kept waiting		
3. Focus on the patient, face them, make eye contact		
4. Listen and don't interrupt patient and respect privacy		
5. Paraphrase patient's story to verify understanding and identify key top priorities		
6. Display empathy, compassion and personal manner		
7. Thoroughly explain what is happening, give time frame if possible (AIDET - Duration, Explanation)		
8. Ask if patient or family needs more information and if not, ask for any reservations or concerns about plan of procedure		
9. Summarize avoiding medical jargon		
10. Talk up your colleagues and team, thank the patient (AIDET), deliver a warm close		

Top things I will improve (first self-assessment period):

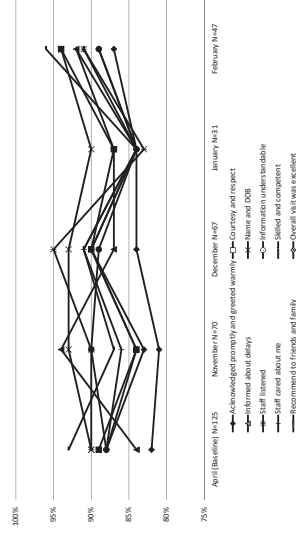


Our Patient Survey

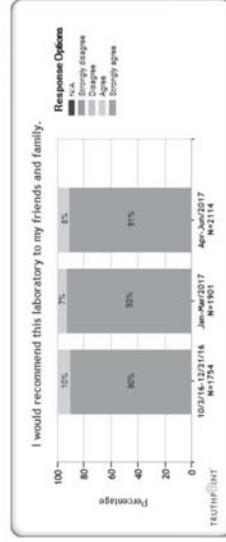
1. I was acknowledged promptly and greeted warmly.
2. I was treated with courtesy and respect.
3. I was kept informed about delays.
4. I was asked my full name and birth date before blood was collected.
5. The staff listened and understood my needs.
6. I was given information in a way I could understand.
7. The staff cared about me as a person.
8. The person drawing my blood was skilled and competent.
9. I would recommend this laboratory to my friends and family.
10. I would rate the overall visit to this laboratory as excellent.



Result Format for Staff Meetings



Sample of Percentage Graph



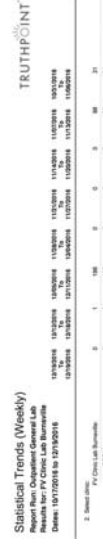
Sample of Statistical Report



Sample of Kudos Report



Tracking Survey Numbers



Share Results with Team

**RESULTS COME
OVER TIME
NOT
OVER NIGHT**

- At monthly meetings
 - Kudos
 - Strong and weak areas
 - Explore the “why”
 - Ideas for improvement
- Post in common area
- Individualized reports
- Cheer them on!



Maintain Results and Engagement

- What gets promoted gets practiced
 - The leader’s role
- Positive feedback and encouragement
- The work is never done



Make it Fun!

- Group discussions
- “What if?” questions
- Pt. Exp. Jeopardy
- Newsletter articles
- Tip of the month
- Question of the month
- Thank you notes
- CHOCOLATE!!!



System Discussion Question

The past month’s question – “How do you respond to patients and their family members when asked to explain the tests you are collecting? Receive an overwhelming number of responses from staff. Overall there was a common theme which included the following tactics:

- Share the basic tests that were ordered with the patient when asked.
- Avoid using medical jargon. Give them simple answers that they will understand, a timeline for expected results, and have them check with their nurse or physician for results. Rather than telling the patient the name of the test battery that was ordered, CRASC, instead tell patient they are checking hemin, as the patient’s physician ordered the test. If the patient has many questions it is best to refer them back to their provider so that they may talk to the patient and provide information based on their specific clinical picture.
- Be aware some patients, such as transplant or oncology patients, follow their labs very closely and are knowledgeable of what each result means. It is possible that these patients may ask more specific questions to make sure that there are no tests missing or that testing is being done at the correct time.
- Politely refer them back to their provider if the answer is unclear or are uncomfortable explaining a test to a patient, politely refer them back to their provider for more information.

In summary, every patient encounter is different. Assess the situation and provide responses to their questions using Layman’s terms as you are able. If you do not have an answer, it is acceptable to refer them back to their provider for more information.



Celebrate Success – Waffle Day!



Implement at Other Sites

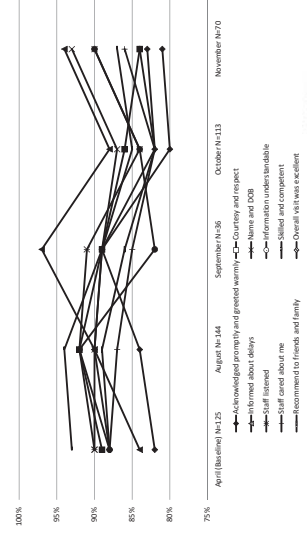


- Consistent Pt. Exp.
- Customer Service Committee
- Site point person
- Compare results
- Learn from each other



Initial Results

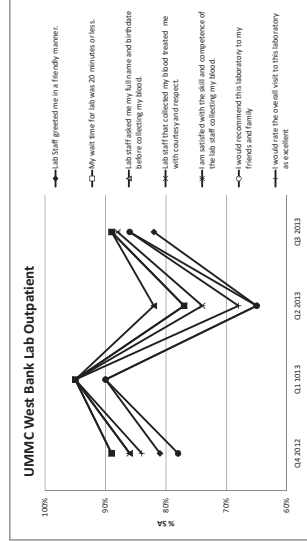
Initial Results



2014 Outpatient Adult Results (First 6 months)



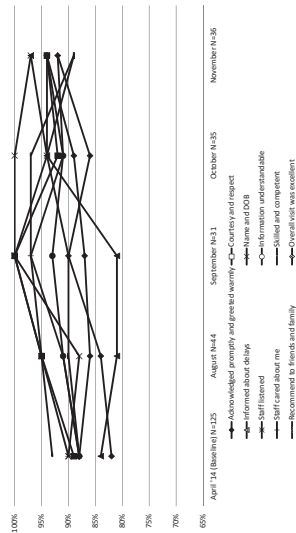
Before Initiative



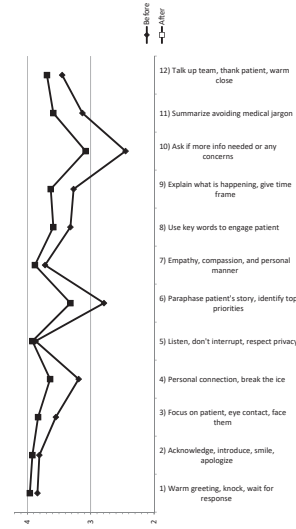
Benefits for patients, our staff, and our entire organization

RESULTS

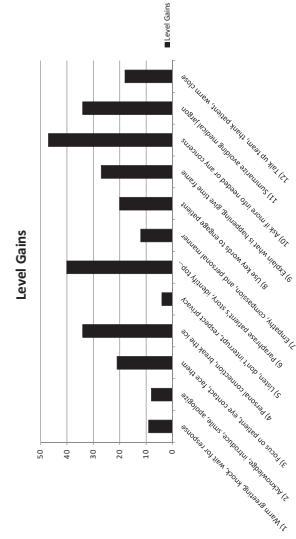
Continued Improvement



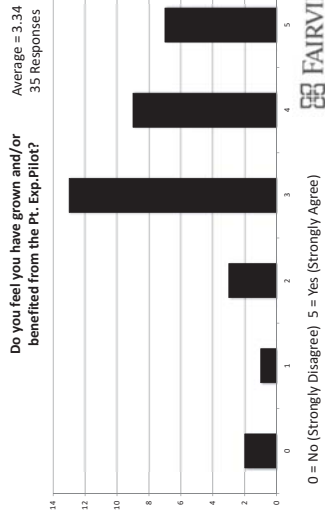
Self Evaluation Results



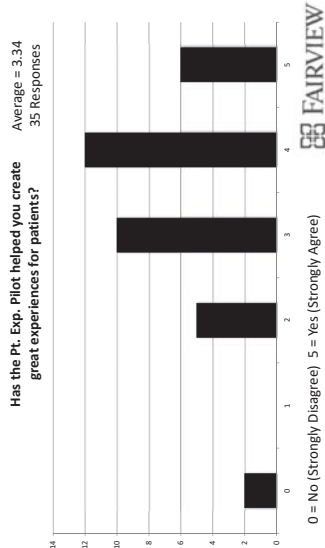
Self Evaluation Results



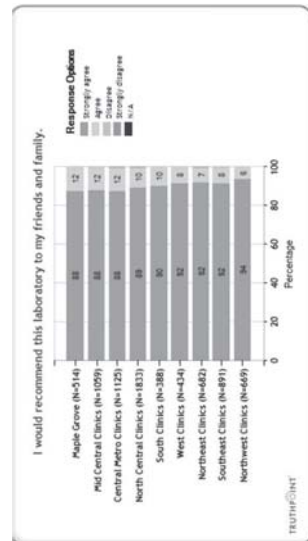
Staff Feedback Survey



Staff Feedback Survey



Site Comparison



Challenges We Faced

- Low survey numbers
- Inpatient surveys = ↑ Time
- Survey fatigue
- Language barriers
- Keeping the momentum



Unexpected Benefits

- ↑ Staff engagement
- ↑ Teamwork
- Team mentors new hires
- Improved relationships
 - Interdepartmental
 - Between labs



Staff Survey Comments

- It is **good to hear from patients** what we are doing well and how we can do better
- Helps me to be more comfortable with my patients by **truly understanding their needs**
- It made my phlebotomy more **interactive**
- It was helpful to **hear how others handle specific situations**
- It helped make me be more aware of myself. Made me **think more about the patient** than myself doing the job I need to do.



Tips to Take Home

- Long term investment – involve senior leaders
- Identify passionate people
- Marathon – not a sprint
- Make it fun!
- Reach out to others

Start a Patient and Family Experience Initiative at your organization

DO IT!



Be Like Jody



- Never stop learning
- Embrace change
- Keep improving
- Teach others
- Share your passion!

Jody's Secret

“Treat every draw as though it is your last”

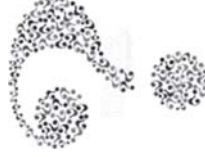


Resources for your Journey to Better Customer Service

- Books:
 - *The Customer Service Survival Kit: What to Say to Diffuse Even the Worst Customer Situations*, by Richard S. Gallagher
 - *Crucial Conversations: Tools for Talking When Stakes are High*, by Kerry Patterson, Joseph Grenny, Ron McMillan, and Al Switzler
- Websites:
 - <http://www.thebervlinstitute.org>
 - <http://www.patient-experience.org>



What questions do you have?



Please keep in touch:

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“I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

- Maya Angelou

