Leading Organizational Change in Patient Experience

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A little bit about Ivan Guerrero, MSHCM

• Ivan is the Program Manager for the Office of Patient Experience at Cedars Sinai. Ivan has over a decade of healthcare experience as well as a Master of Science in Health Care Management from California State University, Los Angeles. Ivan, has worked for multiple hospitals and health systems, where he gained experience as an Admin. Supervisor for Radiology, a Process Improvement Specialist, and other Management roles. For most of his career, the major focus has been the Patient Experience and leading improvement projects that help provide an exceptional experience to patients and families. In his prior organization, Ivan successfully implemented a Patient Experience program that led to him receiving the National Hospital Foundation -Hospital Hero Award 2016. Ivan also has experience working with physicians and providing staff with training on customer service.
Agenda

- Why Culture Matters
  - What Defines Culture
  - Benefits of a strong culture

- Communication Priorities
  - Expectations

- Framework for Action
  - Accountability
  - Support
  - Feedback
  - Engagement
Why Initiatives Fail

Training alone can neither support nor sustain improvement initiatives.
What Defines Culture?
“Culture eats strategy for lunch.” When thinking through drivers of major quality, safety, and Patient Experience aims, cultural drivers should be near the top of any leader’s list. Patterns of behavior that are driven by underlying values, habits and beliefs; the organization’s culture will dominate every other possible driver and may jeopardize changes to processes and structures unless they are explicitly addressed.”

- From frontline staff’s experience in driving performance improvement
Why Culture Matters

• In weak cultures ...
  – Control is exercised through policies, procedures and hierarchy

• In strong cultures ...
  – Staff respond effectively to situations and issues because of alignment to organizational values
Benefits of a Strong Culture

- Better alignment and fulfillment of mission, vision and values
- Higher employee motivation and morale
- Increased teamwork
- Sustainable focus on short- and long-term quality improvement and value around the Patient Experience
Team Communication

Communication competencies play a critical role in driving a high-performance culture

- Modeling good communication practices
- Establishing standards
- Providing visible support to frontline staff
- Evaluating communication competences of staff
- Coaching for improvement
Key Performance Indicator (KPI)

- Rating of Provider
- Rating of Clerks and Receptionists
- Likeliness to Recommend Practice
- Overall Satisfaction
- Wait Time
- Scheduling Appointments
- Rating of Office Experience
- Member Grievances
Rating of Provider & Rating of Clerks & Receptionists

Courtesy & Respect
Listening
Explaining Things
Wait Time & Scheduling Appointments

Responsiveness
Getting Help
Managing Expectations
Likeliness to Recommend Practice, Overall Satisfaction, & Rating of Office Experience

Provided all the necessary and correct Information
Explained information in way patients understand
Connecting-the-dots

“I don’t want to be treated like a patient, I want to be treated like a person”

-upset patient person

www.njafp.org
## Communication Priorities

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<tr>
<th>Causes of Poor Communication</th>
<th>Benefits of Effective Communication</th>
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<td>Information you need</td>
<td>Effective</td>
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Refer to Activity Guide
Leadership Practices

How well do we reflect the behaviors and practices that we expect to see in our team?

Where do we have our greatest opportunities for improvement?
Expectations for the NJAFP Experience

• Behavioral expectations aligned with our values provide a *starting point* for improving the patient and employee experience.
• For leaders and for peers, expectations can be used to make feedback more specific and objective for the team.
• Expectations are aligned with values, emphasizing how the patient experienced is an integral part of efforts to improve the quality of care.
  – Caring
  – Collaboration
  – Accountability
  – Respect
  – Excellence
Framework for Action

A framework of inter-connected management practices and communication competencies that:

1. Reinforce and build accountability
2. Provide consistent support and mentoring to staff
3. Deliver effective individual feedback
4. Engage staff in decision-making and problem solving
Framework for Action

- Cascaded Goals
- Consistent Monitoring of Results
- Daily Huddles
- Integrated Rounds
- Staff Meetings
- Daily Coaching
- Development Dialogue
- Corrective Action
- Shared Problem Solving

Engaging Staff in Improvement

Delivering Effective Feedback

Providing Support & Mentoring

Building/Reinforcing Accountability
Reinforcing and Building Accountability
Reinforcing and Building Accountability: Goal Setting

- The foundational step in driving accountability is establishment of clear, specific goals for the team and individuals.

- Effective team goals flow from the overall strategic objectives established by the organization.
Reinforcing and Building Accountability: S.M.A.R.T. Goals

Specific  
Motivating  
Agreed-upon  
Relevant  
Tracked
Reinforcing and Building Accountability: Principles for Cascading Goals

- Linked to a strategic, organizational goal when possible.

- Goal becomes more specific and tactical as it cascades into the organization.

- Communication of very specific, tactical goals at the frontline helps employees contribute to the achievement of organizational goals.
Reinforcing and Building Accountability: Principles for Cascading Goals

- **Cascaded Goal Example**
  - **Organizational**
    - Achieve “Overall Satisfaction” score of 85% by year-end.
  - **Department/Unit**
    - Increase “Likelihood to Recommend Practice” by:
      - QI = ___  QII = ___
      - QIII = ___  QIV = ___
    - Increase score on “Rating of Clerks and Receptionists” to ___.
  - **Manager/Supervisor/leads**
    - Round at least once on each patient during visit and provide relevant feedback to staff regarding performance.
  - **Employee**
    - Upon check-in, orient and set expectations for each new patient and family regarding communication and next steps.
Activity: Outcomes vs. Behaviors

• In the book “The 4 Disciplines of Execution,” authors McChesney, Covey and Huling describe “lagging” and “leading” goal indicators
  – **Lagging indicators** are the types of goals most organizations usually track and reflect outcomes
    • Financial performance
    • Quality measures
    • Patient satisfaction scores
  – **Leading indicators** are specific things we do to positively impact performance and generally reflect behaviors
    • Number of patients sitting in lobby at the moment
    • Number of new patients coming in today
    • Number of “no show, no call”
Reinforcing and Building Accountability: Performance Dashboard

- Summary of performance against key organizational and departmental goals helps to see the “big picture.”
- Results should be reported weekly and discussed monthly during department meetings.
- Communication of performance results guides ongoing course correction and highlights opportunities for involving staff in problem solving.
- Great results should be celebrated as a team.
Providing Consistent Support & Mentoring
Providing Consistent Support & Mentoring: Daily Unit Huddle

- Led at the beginning of each day by the supervisor or lead.
- Brief “stand up” huddle lasting just 5 minutes.
- Highlight key issues for the day.
- Solicit brief feedback from staff
  - Current challenges/issues
  - But clarify that huddle is not for problem solving
  - Review performance weekly against department-specific goals
- Encouragement and confidence building.
Providing Consistent Support & Mentoring: Integrated Leadership Rounding

- **Goals and Purpose**
  - Leadership Rounding is designed to supplement – not replace – staff meetings and individual feedback
  - Different names … same idea and purpose
    - Management Rounds
    - Going to the Gemba
    - Rounding to Influence
    - MBWA
Providing Consistent Support & Mentoring: Integrated Leadership Rounding

**Leadership** rounding is different from **management** rounding

- Two key questions/discussion topics:
  - How are things going?/How’s your day?
  - What should we do about it?
- What staff need/want to hear most from senior leaders ...
  - Why
  - “Thank you”
  - “I’m sorry”
Providing Consistent Support & Mentoring: Integrated Leadership Rounding

- When rounding on patients:
  - Engage them in dialogue so that your visit does not seem like an interrogation.
  - Ask open-ended questions: “How are you doing?” “Tell me about today’s visit…” to allow the conversation to go where the patient prefers.
  - Ask if our team is meeting their expectations – i.e. “Is this experience what you expected. If not, what can we improve?”
  - Ask if there is anything we can do to make their visit more comfortable or a better experience.
  - When a patient mentions a specific staff member:
    - Compliment/thank that employee for their specific efforts, or
    - Coach that staff member regarding improvement
  - Thank them for choosing your practice.
Providing Consistent Support & Mentoring: Integrated Leadership Rounding

- While rounding on patients, **round on staff** as well.
  - Start with open-ended questions to initiate discussion.
    - “How is your day going?”
    - “Are there any unusual challenges you are dealing with today?”
  - Inquire about specific new procedures or practices that are being implemented.
    - “How are the changes to the patient arrival and registration process going?”
    - “How is the new module in the electronic record working?”
  - Ask about priority initiatives that are critical for the team.
    - “Have you attended the new service training? What are your thoughts?”
  - Strive to express praise and gratitude approximately **five times** as often as you offer constructive criticism.
Providing Consistent Support & Mentoring: Staff Meetings
Are you lonely?
Tired of working on your own?
Do you hate making decisions?
HOLD A MEETING!

You can—
• See people
• Show charts
• Feel important
• Point with a stick
• Eat donuts
• Impress your colleagues

All on company time!

MEETINGS
THE PRACTICAL ALTERNATIVE TO WORK
Providing Consistent Support & Mentoring: Staff Meetings

Why have a meeting?

- Decision-making
- Relationship-building/community
- Education/information
- Inspiration/motivation
Providing Consistent Support & Mentoring: Staff Meetings

- Staff meetings are the most effective forum for meaningful dialogue with your team.

- Receiving information and feedback from staff is as important as giving information.

- Well-planned and facilitated staff meetings improve employee satisfaction and engagement.
Providing Consistent Support & Mentoring: Staff Meetings

Guidelines for Better Meetings

• Start the meeting with a patient story
• Set specific and realistic goals for each meeting.
• Prepare/distribute a written agenda several days before the meeting.
  – Allocate time for each agenda item.
  – “Negotiate” allotted time frames and priorities on the agenda mid-meeting if necessary.
Providing Consistent Support & Mentoring: Staff Meetings

Guidelines for Better Meetings

• Judiciously manage time to be respectful of staff.
  – *Start* on time.
  – *Stay* on time.
  – *End* on time.

• Start strong.
  – Outline specific goals for the meeting.
  – Briefly review and gain agreement on agenda.

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Sample Staff Meeting Agenda

- **Welcome**
- **Introduction**
- **Meeting Goals & Objectives**
  - Review and discuss departmental dashboard
  - Discuss ongoing operational challenges, priorities, and pain points for improvement
  - Discuss upcoming LEAN event goals and process
- **Departmental Dashboard**
  - Quality
  - Patient Experience
  - Productivity
- **Organizational Updates**
  - QMIS: Compliance with key measures
  - Status of LEAN 5S event improvements
- **Human Resources**
  - ETO policy changes
  - Service awards recognition
- **Finance**
  - Patient charge documentation changes
- **Group Discussion**
  - Operational updates to the new code
  - What new (synchronized) challenges have been revealed or have been significantly improved through reviews?
  - What processes or practices continue to negatively affect our team and make care or patient care more challenging?
- **Meeting Summary**
  - Range of issues and decisions
  - Next steps
Providing Consistent Support & Mentoring: Staff Meetings

Guidelines for Better Meetings

- Allocate significant time for staff participation and input.
  - Two-way communication makes staff meetings dynamic and encourages future attendance.
  - Active participation increases employees’ understanding of issues and their buy-in to changes in practice or procedures.
Providing Consistent Support & Mentoring: Staff Meetings

Guidelines for Better Meetings

- End strong
  - Summarize key points and key decisions.
  - Clarify questions/issues surrounding those points.
  - Assign/clarify responsibility for follow-up.
  - Outline next steps.
  - Distribute minutes of key points discussed during the staff meeting.
In your opinion, what are some examples of topics/issues around the Patient Experience we should cover during:

- Daily huddles (?): 

- Rounding (?): 

- Staff meetings (?): 

Refer to Activity Guide
Delivering Effective Feedback
Delivering Effective Feedback: Daily Coaching

- In-the-moment comments on a job well done or areas for improvement.
- Strive for 5-to-1 ratio of positive to constructive feedback.
- Reinforces culture of appreciation and recognition.
- Makes constructive criticism more powerful and better received.
Activity: Reflection

How close are you to 5:1?

- Think about your interactions with your team over the past week, especially your lower performers.
- Jot down examples of comments or feedback you’ve given your team.
- For homework, informally track your comments for a day or two to get a sense of how close you are to 5:1.

A LITTLE CRITICISM GOES A LONG WAY

Top performing teams give each other more than five positive comments for every criticism.

PERFORMANCE

SOURCE LOSADA & HEAPHY: THE ROLE OF POSITIVITY AND CONNECTIVITY IN THE PERFORMANCE OF BUSINESS TEAMS, 2004

HBR.ORG
Delivering Effective Feedback: Development Dialogues

- More structured than daily coaching.
- Provides more specific advice on skills/behaviors and the implications of not changing.
- More appropriate for recurring behaviors that limit employee’s success.
- Can be verbal or written.
- “You are an important member of our team. Working on these things will make you even more successful.”
How to Provide Constructive Feedback

- State purpose of conversation.
- Provide facts/observations.
- Offer benefit of the doubt and/or positive acknowledgement of other behaviors.
- State expectations around the specific behavior.
- “Let’s talk about…”
- Re-state expectations.
- Confirm buy-in.
Delivering Effective Feedback:

- Counseling and feedback for most serious violations of policies, procedures or standards of behavior.
- Clearly outlined consequences for continued poor performance or behavior.
- Always documented in employee’s file.
Collaborative Problem Solving
Collaborative Problem Solving: Overall Framework

- Application of *Breakthrough* to the patient experience
- “Key Principles:
  - Process is more important than specific techniques.
  - Encourage open dialogue and brainstorming.
  - Leaders set overall direction; staff embrace the problem and design a solution that meets or exceed expectations.
Collaborative Problem Solving: I.D.E.A. Model

Investigate
• What’s the problem and the cause?
• What additional information do we need to solve the problem?

Design
• What does perfection look like?
• What is the best solution?

Execute
• How will we pilot our solution?
• Who needs to be involved?

Adjust
• What worked and what didn’t?
• Why?
Summary

Leading Organizational Change in Patient Experience

• A high-performance culture lives at all levels of the organization ... but leadership sets the stage by the values and behaviors we model.

• Sustainable improvement in skills and behaviors is a journey, not an event.

• Leadership is most powerful when we are connected to the people on the frontlines who provide care to the patients and families we serve.