



Humanizing the Patient
Experience to Build Customer
Loyalty & Financial Sustainability

Worksheets

Worksheet #1: Organizational Challenges

There are numerous challenges facing us in healthcare today. Some of these include:

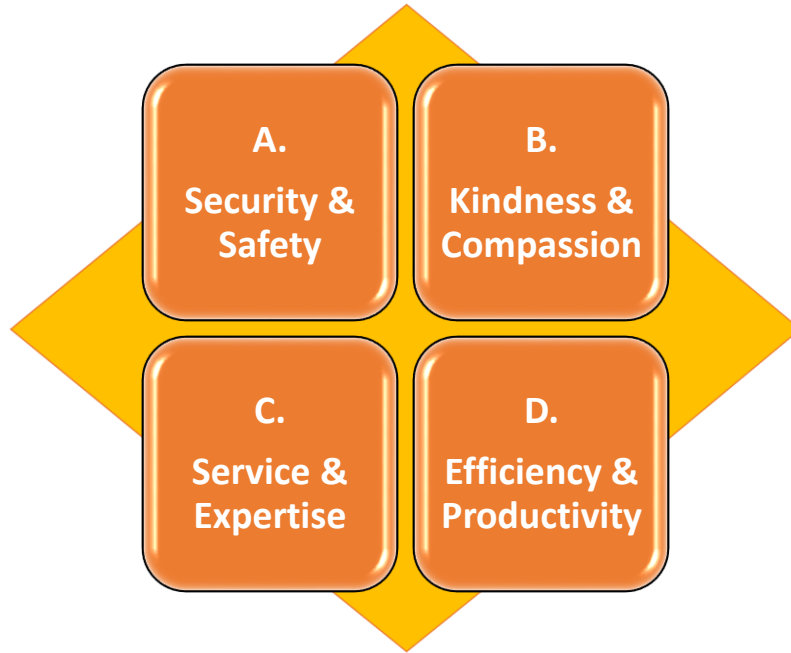
- ▶ Increased competition for Medicaid beneficiaries
- ▶ Timely access for 1st time and follow up appointments
- ▶ Generational challenges among staff members
- ▶ Lack of resources for some types of client services
- ▶ Increasing patient and staff fears about potential violence
- ▶ Less than expected outcomes on Key Performance Indicators
- ▶ Limited resources for expansion programs/projects
- ▶ Staffing shortages
- ▶ Revenue shortages
- ▶ Payment methodologies
- ▶ Poverty and other social determinants of health
- ▶ Entitlement expectations among staff members
- ▶ Patient no shows and/or staff productivity
- ▶ Increasing administrative demands

Identify Key Challenges Facing Your Organization

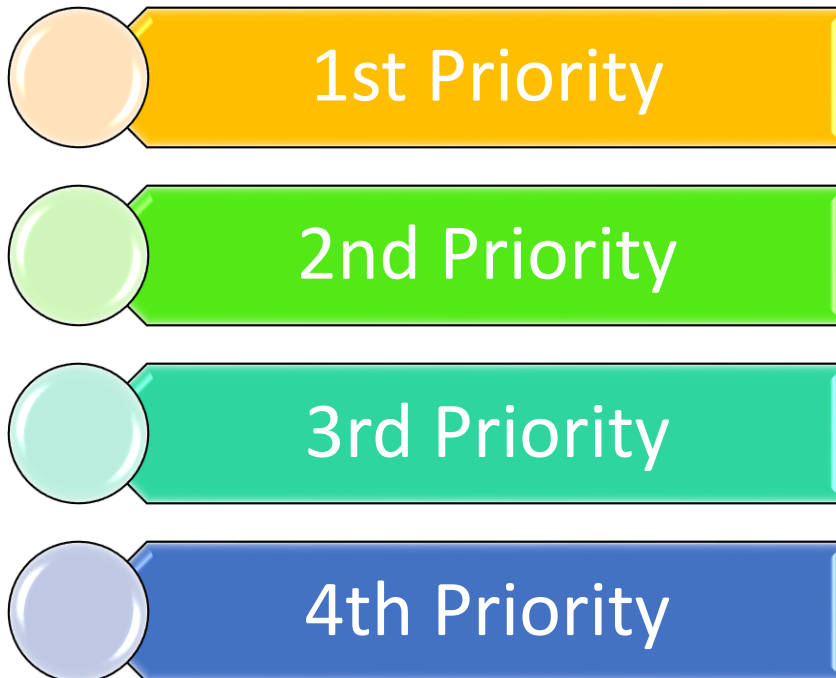
1. _____
2. _____
3. _____
4. _____
5. _____



Worksheet #2: Operational Priorities



Insert A, B, C, & D into the circle of level of priority you think it should have in your organization.



Worksheet #3: Service Promise

What types of words do we want to include in our Service Promise? (Circle those you would like to include and/or add others):

Assistance	Excellence	Kind	Respect
Attentive	Exceptional	Kindness	Respectful
Beneficial	Experience	Knowledgeable	Responsive
Care	Expertise	Listen	Safe
Caring	Friendliness	Nurture	Security
Community	Goal	Objective	Shield
Compassion	Gracious	Outstanding	Skill
Confidence	Happiness	Personalized	Spirit
Consideration	Healing	Person-Centered	Teamwork
Courtesy	Help	Pleasant	Thorough
Customer Service	Helpful	Potential	Together
Dedicated	Health	Pride	Thoughtfulness
Dignity	Healthful	Progress	Understanding
Education	Hope	Provide	Value
Effective	Human	Quality	Warmth
Empathy	Humanity	Quality of Life	Wellbeing
Enrich	Improvement	Recovery	Wellness
Ethical	Inspire	Refuge	

Circle aspects of these services promises that you like:

We inspire confidence and hope to reach your highest potential by providing an exceptional healing experience.

We unite healing and humankindness to create peace of mind for every person, every time, through a culture of yes.

We inspire hope and promote wellness in our community by creating outstanding experiences in a caring and compassionate environment.

Together, we inspire hope and build trust through compassion, excellence and personalized care, every day, every step of the way.

Live well and thrive. We'll take care of the rest.

Our promise is to serve with excellence and dedication. To provide peace of mind for those who depend on us. To enrich the lives and health of our members and the communities we serve.

Your idea of a good Service Promise:

**Everything is
the Patient
Experience**

Worksheet #4:

**What are your Patient Experience objectives
for your organization ?**

**What do you want your patients to say to others about the
experience they had at your organization?**

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____

**What acts of kindness have you experienced in a healthcare setting or seen others
provide in a healthcare setting that was meaningful to you?**



Embrace Kindness

PLAN



Worksheet #6: Plan Development & Implementation

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____
- 7) _____
- 8) _____

What/How/When do we measure to determine if success is achieved?

- ▶ **Encounter/billing trends**
- ▶ **Departmental trend of monthly profit/loss**
- ▶ **RAE revenue trends for your organization vs. your competitors**
- ▶ **Trend of individual provider survey results**
- ▶ **Trend of individual provider billing amounts**
- ▶ **Trend of clients who engage in treatment vs. those who do not**
- ▶ **Staff turnover rates**
- ▶ **Productivity**
- ▶ **Performance measures**
- ▶ **Patient experience surveys**
- ▶
- ▶

Endeavor not for good customer service, but strive for raving fans!