JAMIE WEINSTEIN: Hi, everyone. This is Jamie Weinstein from the MayaTech Corporation. And I want to welcome you to the SAMHSA-HRSA Center for Integrated Health Solutions MAI-CoC Virtual Community of Practice. This is Enhancing Client Retention by Engaging Your Staff in Customer Service. And our faculty today is Ann Hogan.

A disclaimer and disclosure-- please note that the views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services, the Substance Abuse and Mental Health Services Administration, or the United States Department of Health and Human Services. The presenter, Ann Hogan, has no financial conflict of interest to disclose.

Welcome to the virtual CoP webinar format. This session is a 30-minute on-demand CoP webinar. After viewing the webinar, please follow the link provided at the end to provide immediate feedback. You will also have access to an online question and answer chat session, designed to follow up on the topics covered in this CoP. Submit your questions online and check for daily answers.

Our presenter today is Ann Hogan, certified senior professional in Human Resources. Miss Hogan has over 25 years of experience in the Human Resources field, including training, employee relations, conflict resolution, employee development, strategic planning, and benefits and compensation management. Miss Hogan's full bio is available on the CIHS website. And now I'll turn it over to Ann.

ANN HOGAN: Thank you, Jamie. And thank you to SAMHSA and to HRSA and to MayaTech for giving us this opportunity to talk about enhancing your client's experience through engaging your staff. And so, today, we're going to talk about-- the agenda is, why is an engaged team important?

Think about that. Why is it that it's important that we're engaged in our job that we're doing every day? What are six beginning steps to engage employees? And these are not steps that you have to rely upon your leadership to do. These are steps that you can do within your own team, whether you're a manager, a director, a staff of that team. It doesn't matter. You can begin to engage employees on your team.

Developing customer service standards-- how do you develop those standards? What should those standards be? And again, think about it. It doesn't have to be, necessarily, that you're waiting for the organization to move on that. You can do that within your own team. And then how do you engage your team for that client's experience? And through that experience is when you'll actually get client retention, or patient retention, or even, oftentimes, patient compliance, because they have a relationship with you.
So think about that as we go through today's agenda and the different ways in which we're going to talk about engaging your team. So why is an engaged team important? Oh, my gosh. It's so important. 80% of employees with a high degree of trust in the management are committed to the organization. Think about that. And who are they committed to organizations?

Oftentimes, as you'll see, that people are really concerned with their direct supervisor. So think about that. It doesn't necessarily have to be the organization as a whole. Are they committed to you? Are they committed to you as a coworker, as a supervisor, as a manager, as the director, as a peer? And you think about that, and that's how you then begin to engage your team.

Highly engaged employees have fewer absences. And one thing we'll talk a little bit about is how to identify those areas of improvement in the organization. When you have a certain team or a certain clinic site or a certain area within your organization that's missing a lot of work, that may mean that they're not as engaged as someone else.

So think about that, because, again, if you're enjoying what you're doing, you're making a difference, you have that purpose each day, that means you come to work. If you feel like, ugh, I have to get up and go to work again, then you start missing work. So think about that. When you look at some of these numbers, they tell a little secret as to what's really going on in your organization.

And then engaged employees outperform disengaged employees by 20% to 28%. That means that your staff, if they're engaged, or your team, or your peers-- you can create 20% to 28% more productivity within your team. And I know that's very-- in behavioral health, in dental, we already feel overwhelmed. We have so many patients. But again, you're going to have those patients either way, right? Why not enjoy and engage with those patients, engage with the staff, enjoy the job every single day? That is a choice that we all have.

I invite you to watch a very, very telling video here. So now the video-- what have you learned? You've learned about engaged employees, right? Doing my job above and beyond means that you're an engaged employee. You want the organization to be successful. That's also engagement, right? That's what you're going to make happen every day. You're going to talk about mutual commitment. You're committed to the organization. The organization's committed to you. The patients are committed to you. The patient is committed to the organization. That's engagement.

Again, don't just look at this as employee engagement. That's what this video is about. But think about it in terms of your patient. You know that 480%, you have more success if you have committed employees? 480%. It's better than if you don't have engaged-- not engaged employees, right? You want 480% more productivity. Better outcome. That's what you want.

How can we engage our employees? And think about this. Also, it can be used to some extent on the patients, a little bit. Some of these can. There's six steps that you can use. One is let people know what's happening in your organization or on your team. If you're a team manager, if you're doing team-based care, patient centered care, you work as a group. No one piece can work independently in a patient-centered care team.
Not only when you huddle or if you round people, make sure that they know. Right? You know how important it is that everybody's up to date on this current patient. Same thing applies. Let everybody know what's happening in the organization, or in that department, or in that clinic. Make people feel like they have information, because, if they have information, then they can actually support you.

Too often, we want to support, but we don't tell anybody why we're doing something. Right? That doesn't necessarily happen well. Doesn't have good outcomes, right? So let them feel included in the decision making process. You, as integrated care specialists, know how important that is, right? You do motivational interviewing with your patient. You want them to feel included in their decision making, right? What do they have control of? That's how you get behavioral change.

So you want to make sure that the employees, your team members, if you're a CEO, that your entire organization-- let them in. And sometimes you're going to make decisions that they don't agree with. But sometimes, if you give them information as to why you came to that conclusion, it can change their thought process. At least they'll support the decision. They may not agree with it, but they will support it much better if they know how that decision was made.

And certainly, there are exceptions to all of these, at times, especially if you're a leader of an organization. But generally speaking-- I mean, I'm talking 85% of all decisions-- when they really come down and affect the employees, you need to let them know why that decision was made that way. Let them know your expectations.

And this is crucial when it comes to your patients, when it comes to employees, when it comes to team members, when it comes to people in leadership and how they treat you. Doesn't matter. What are your expectations as far as behavior? What are your expectations as far as interacting with patients? What are the clear expectations that are required of the position? We talked about position descriptions in webinar number one. We also talked about expectations. So make sure-- a lot of times, people overstep, or they don't do enough, because they're not sure what's expected of them.

If you think about Southwest Airlines-- if any of you have flown Southwest Airlines-- whether all the employees are totally engaged or not, I'm sure there's a few that aren't. But generally speaking, as a flyer, I don't know that. Right? I don't know that. What I experience is that I feel like I have flight attendants, pilots, that are somewhat included in the decision making process, right?

They can do the safety video, dancin' and roarin' in the aisle, unlike other airlines, right? They can make it fun. Their expectations are pretty clear, generally speaking, right? We've all had instances where maybe it hasn't been the perfect flight. But generally speaking, they acknowledge you when you get on the plane with a smile. They are happy that they are now flying with you for the next few hours in a little tube through the sky. That's how they make you feel, right? They make you feel like you're special. And they do that in many ways. And that's the expectation of Southwest Airlines.
Now, what's happening in the organization? If you ever look their magazine, their CEO does a letter not only to the flyers of Southwest Airlines, but it also gives information to the employees. That's in their newsletter every month. And they also have been known to do a voicemail out to all employees every Friday and let them know what's going on in the organization. They communicate very well. So just think of that example when you think about how to engage with patients or employees.

Allow your employees to make decisions when it comes to customers and clients. How much leeway can you allow? OK? We've all been in that situation where you tried to return a product, and you try to return something, and the person doesn't have the correct badge or the correct scanning ability to actually take your return. And you have a receipt. You have everything there, right?

Make sure that, when you look at those processes for not only your employees, your customers, your clients, your patients, however you want to call that, when you think about that, how does it actually look in your organization? Can employees make decisions, or do they always have to call somebody? Or do they always have to check with someone first? That frustrates people.

And sometimes, in health care, we think that we're different. We're different, because we have so many needs, and everybody has different needs. And that is very true, but there are certain aspects that we can make those decisions. We can allow our employees to make decisions. So think about how you can improve that within your own team. Create values and a vision statement of how to treat customers and clients.

And I'm going to refer to something that was actually put out by the priority in person-centered care from SAMHSA and HRSA. And they used the example of Nordstrom. So their example is Nordstrom versus primary care and behavioral health centers. So Nordstrom, the customer always comes first. Primary care and behavioral health center, the payer comes first.

Nordstrom, customer defines excellence. The delivery system defines service in primary care and behavioral health. So what is the best for the customer is the best for the organization at Nordstrom. Now, you're getting the idea that these are not actual ways to interact with patients, correct? Because the next one is, for primary care and behavioral health centers, what's best for the clinician's schedule is best for the organization. OK?

That's how we too often look at things. And we need to reverse it. So what is the best for the patient? And that will be best for the organization. Now, I know clinicians' schedules take a huge priority. So we need to move them and get them on board also, that the patient is the center of the organization. So the delivery system often defines service in primary care and behavioral health care. That's true.

But how do we define excellence when it comes to our patients? There's more things than just all the ways that we measure and report on, right? How are our patients feeling? Do they feel like they're part of their care? We can also add some things to those data and metrics that we all can think. Think about that-- how you create the value and vision statement.
And going back to Nordstrom— we don't have a Nordstrom here where I live. But what I have heard about Nordstrom is they have fabulous customer service. I don't know if they still do with all the big box stores. But they're known, right? They're known as the leader when it comes to customer service. When you think about Disneyland or Disney World or just the Disney company in general, you think about the values and vision and what they expect when it comes to their customers.

In our world, let's insert a true service plan and policy to that next bullet. When you think about that, what does Disney do? What do they do that's different? And why can't we use that when we do patient-centered care? We can do that. And so it's not that much of a leap, right? We're dealing with people either way. So think about how you're going to engage your staff.

So now, when you think about developing your customer service standards, think about some of those organizations like Nordstrom, like Disney, like Southwest Airlines. How do you think they indicate it, and what are their standards as they pertain to customer service? Do you think they have this pretty well spelled out, and the expectation is pretty clear for employees? They sure do. So make sure.

And at the same time, the expectation is partly that you'll take responsibility. Right? You'll do the right thing for that customer. And so, in health care, are we doing the right thing for that patient at the time? What decisions can we actually make now? The best way to get people on board is actually to provide them data as to, where are we at now?

And the way that you do that is you do surveys. You can do client satisfaction surveys, patient satisfaction surveys, or employee engagement surveys, even employee satisfaction surveys. They are two different things. But at least start with a satisfaction survey. Find out, where are your employees? Where are your opportunities to improve? Now, when it comes to patients, again, ask them, where are our opportunities to improve? Allow them to give feedback, and then actually use that information.

And we'll talk about how to do that. So some of the resources are from SAMHSA. And this link here, this eSolutions newsletter, will actually give you the documents on the priority in patient-centered care. And it will talk about how Nordstrom looks at things versus how we look at things, at times, in primary and behavioral health centers, and how it needs to be reversed. The thinking does need to be reversed. And it'll talk about the customer priority being a high-quality service level.

We can all agree, right? That's what we need. That's what we provide, actually. We already do that. Are we convenient? That can be a challenge, right? Convenience. But we've got to work on it, right? A satisfactory experience. People don't expect perfection. They do when they go to Disney World, I guess. But they don't necessarily want that from everyone else. But a satisfactory experience. That's not a high thing to be able to attain.

Accessibility. We all have that. We all have room to improve our accessibility for our patients. We just need to get creative as to how that's actually done. Friendly care-- friendly care doesn't cost anything. We just need to hire the right people. And I know I make that sound easy, but there's tricks to that so we can get friendly care.
And if we have the expectation of friendly care, believe me, the employees will step up. So think about how you're going to collect that data, and provide that information to employees—that you can start making these changes. Also, the National Institutes of Health also has some good articles. So be sure to connect to those too.

So you're going to develop your customer service standards within your organization. And I should have put that as "patient service standards," right? But at the same time, sometimes we think of patient and customer differently. And we shouldn't. They are our customers. And believe me, they have choices, right? Sometimes we think they don't, but most do. And we need to make sure their experience makes them want to come back to us, not need to come back to us.

So define your customer service within your organization. What does it really look like to experience being a patient in your health center? What needs improvement? Again, survey your employees. What tools or training do employees need to meet the standards? Oftentimes, it's not a lot. A lot of what needs to change, sometimes, is just the expectation that we expect friendly care, and that we all expect it.

And they talk about how the five people around you-- that's who you rise to be, right? So if you're not one of those rising to the friendly care, don't expect others around you to come with you. But if you rise to it, believe me, you will see a change in the attitudes of your peers and coworkers, or people that you work with, right? They'll be like, wow, what happened to this person? And they might feel that way for a little bit. But believe me, they'll rise to meet the standard that's set.

And the other thing is, what does it look like, and what needs improvement? You can do this through patient mapping exercises. And I'll just give you a brief overview of what that looks like. And that would be that you actually pretend like you're a patient. And I don't mean like you have to actually go through it. You probably should try to call your call center or call your clinic, and try to get an appointment, and find out how friendly people are.

But it's not about getting people in trouble. But it is about going through and actually mapping your experience. And so you can see where your pitfalls are. Where are your detours, where are those roadblocks? And you can work on correcting those things. So patient mapping is a great thing. And we can talk more about that during the chat.

We are going to have a chat here towards the end of January. And so, if anyone wants more information on patient mapping or on position descriptions, which we talked about in the first webinar, or any of this information that we've got here, please join us for the chat. We will be available, answering questions. We can share resources. So make sure you join us for that chat.

And again, back here real quick, what do clients expect? What do your patients expect? Again, ask them. A lot of times, their expectations are actually not out of the ordinary that any of us would expect from some other organization. So just ask them, what do they expect, and how do they see that you can improve?

Now, how to engage your team for client retention? Again, develop your plan with all staff where ideas and opinions are shared. So if employees feel like they have an option to share
that information, they're more likely to get on board. You're more likely to want to go on a trip when you know where you're going, right? You know that you have impact on what you can do or what you can't do. You don't want to necessarily just be kidnapped, and put in a car, and say, we're going.

So think about where your plan is going. How do you get employees on board? How do you do that? You allow them to participate. Conduct your SWOT analysis. When you think about a SWOT analysis for your strategic plan, OK? Your customer retention should be a huge portion of your strategic plan this day and age. Our patients have choices. Not all, but most.

So what are your organization's strengths? What are you really, really good at? What are your weaknesses, and can you improve that, and how are you going to do it? What are your threats? Sometimes it's another organization just like ours down the street. And we know there's enough patients to go around, but we just want to make our organization the best we can be. So what are your threats?

And then what are the organization's opportunities? What are your opportunities to improve? How hard is it to do that? Sometimes it's not a big tweak. Sometimes it's just a change. Sometimes we have policies and procedures in place that prevent it from taking advantage of our opportunities. So, really, it's looking at that whole organization and saying, what are our opportunities?

Outline the plan for improvement, and share it with everybody. Share it with your patients, share it with your staff, share it with your leadership, share it with your community. Let everybody know, this is our plan to improve, and this is how we're going to do it. And hold us accountable to getting it done.

Evaluate the plan on a regular basis. It's not enough to put in a plan and say, we're going to do it. Right? That's like our January 1 goals. We all made those 10 days ago or nine days ago. And how many are you still doing? You've got to think about, what is that outline, and how are you going to evaluate what's really happening? It's January 10. We'd probably all better evaluate our resolutions for this year.

But for this, on client retention, think about it. Do you need to evaluate it every quarter? Twice a year? When is it? And then make regular adjustments. Just because it didn't work, necessarily, the first two months of the year, it didn't drastically improve your patient satisfaction or your client satisfaction, doesn't mean it's not worth pursuing further. It just might require a little adjustment, or things take time to actually pick up.

Communicate. Again, communicating is essential so that all staff know where they're going for client retention, what the expectations are, and how they fit in. Too often, we blame or accuse one position or the other when it comes to patient retention. Either the doc, the providers, the medical assistants, the front desk, billing, whatever it is, right?

We want to say, they're not doing their job in customer retention. Or we think we are doing it perfectly, right? But really, it's an organizational effort. Every one of those positions is very important to the organization. Everyone has a key or a role to play in customer retention. So make sure everybody knows what their role is and how they go about doing it.
Now, the review today is the importance of the employee engagement. There are six steps that you can begin now. They don't take more grant funds. They don't take a bigger budget. They take communication, they take action. So you can do those six steps now, without any other resources. They take commitment.

Now, customer service standards, again, write them down. Engage your patients. Engage your customers. Engage your staff. Think about what those standards should really be, because you can provide the same customer service that Nordstrom does, Southwest Airlines, or Disney. None of that is based on all the infrastructure.

A lot of it is based on attitude, the ability to make decisions, and providing friendly care. It's amazing how a smile or how being friendly can change a patient, even if they had not such a great visit, right? Just people feeling like they've been cared about makes a world of difference when it comes to your customer service standards.

And engaging your team. Let them in. Let them know what the expectations are. Give them lots of information. Provide them, and make them feel like they are part of a team, and that they know where they're going to go to. Now, with that, I'll turn it back to Jamie. But I do want to remind you to please join us for the chat. We're going to share a lot of information. We're going to have a good time.

And you know what? If you have any questions, or if you have questions on where we got some of this information, or how do I get more information about employee engagement or customer service standards, or interview guides that we talked about last time, we'll be here for that full week to engage with you.

You can contact Jamie at any time. But during that week, we're really going to focus on what we went over in these last two webinars. So with that, Jamie, do you want to talk about additional questions and more information and resources that are available to everyone that's on the webinar?

JAMIE WEINSTEIN: I do. Thank you so much, Ann. Thank you for the wealth of information that you provided today. It was excellent. So we can just see that here we have available citations for books and articles that were referenced during this presentation. After this webinar, please follow the link to provide feedback on the webinar via SurveyMonkey at the link below.

And then, as Ann mentioned, we really encourage you to participate in the online Q&A chat session. You can participate in that chat by contacting me directly at jweinstein@mayatech.com. Recordings and slides for the Client Retention CoP webinar will be available on the CIHS website at the link below.

Should you have any additional questions, you can always feel free to reach me, Jamie, as well as my colleague Gretchen Vaughn at the address on your screen. And for even more information and resources, as always, please feel free to visit http://www.integration.samhsa.gov or email integration@thenationalcouncil.org. Again, we thank you for joining us. Please take a moment to provide your feedback by completing the survey at the link below. Thank you very much.