



MARCH 2022

# Customer Connections

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## Using an Insight Series

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## Recording Roadmap

Key sections of the Connections Session are listed below with the associated time within the video recording found here: <https://player.vimeo.com/video/688168047>

- Insights Series Training..... 2:33
- Discussion..... 22:40

# Why | Insight Series

*The thoughts behind producing this type of resource*

-  Share learned insights using storytelling
-  Leverage stories for coaching
-  Offer scalable improvement
-  Designed for the virtual working environment
-  Created to be accessible when limited time for improvement exists
-  Accessible on demand in order to go at own pace

# What | Insight Series

There are currently three series available. All are applicable across different healthcare environments by simply altering the language to match your current practice (ie: handoff vs huddle).

## **EMPATHETIC COMMUNICATION AND SERVICE RECOVERY SERIES**

- This six-part video coaching series is designed to help leaders and their teams learn the critical skills to improve communication and more effectively deal with service issues.

## **CONNECTING WITH TEAMS THROUGH PATIENT FEEDBACK SERIES**

- This eight-part video coaching series is designed to help leaders utilize patient feedback to improve the patient experience and employee engagement. The series will lead individuals through ways to develop themselves and their team to drive a positive experience by unlocking the power of sharing patient feedback with teams and colleagues.

## **COMMUNICATING WITH PATIENTS AND FAMILIES SERIES**

- This eleven-part series is designed to help leaders improve individual and team performance when it comes to communication in care settings. The series is an opportunity to refine and improve your ability to communicate effectively in a variety of situations. It will lead individuals through ways to develop themselves and teams to drive positive experiences by unlocking the power of practiced and thoughtful communication.

## Who | Insight Series

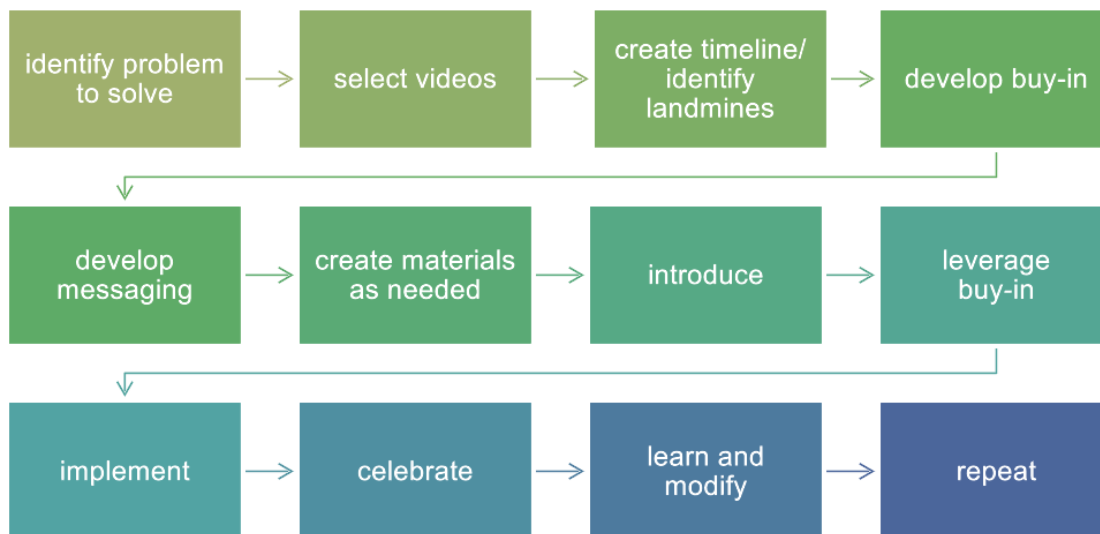
- Any department could benefit
- Leaders and drivers of improvement can decide
- Individuals
- Teams

### Examples of problems the Insight Series can provide support for:

- Struggling with metrics/comments related to communication and trust?
- Have a concerning number of unresolved service alerts?
- Have any issue of process, ownership, accountability or skill relative to service recovery?
- Developing PX training curriculum?
- Does your service recovery strategy need to be re energized?
- Dealing with burnout?
- Have a team used to hearing only negative comments?
- Trying to improve engagement?
- Interested in improving teamwork?
- Looking to add another, impactful tactic to their PX strategy

## How | Insight Series

### Recommended Process



### Making it stick | Flexibility Is Key

- Plan Leadership loops for accountability
- Celebrate usage and successes as a result

## The Technical How

- Accessible through Realtime resources
- Can be viewed without a login
- Web based
- Can be loaded in a learning management system

### PATH TO INSIGHT SERIES WITHIN REAL-TIME

Log into the Real-time portal > Resources > (search for Insight Series) or (scroll down to the improvement library)

## Examples & Questions

- Has anyone used the Insight Series in a way and have had any wins or successes?
  - Suzanne with Mercy Health – She is working with the primary care clinics, utilizing the Connecting With Teams series. She took to the directors and above through the series and is now working with the practice managers. They plan to pick 1-2 videos based on their priority matrix results. In primary care there is so much variability, so they are going to focus on something that all of the practices have in common to identify the actionable items. The managers will then follow-up with their teams. She is still developing the rest of the process but has found the series to be very helpful.
- What challenges are you up against? What landmines do you find are difficult?
  - Erica with Wellstar Health System shared that she wants to incorporate this with new orientation training. Now knowing that she can share them with people who do not have access to the Real-time portal this makes it possible.
  - Katie with Riverside Health System shared that she is struggling on the perfect venue to share videos. Loved the ideas of uploading into a learning management system for tracking. Is there a best format to utilize to share it in a larger group?
    - Christa shared that some organizations will play the video during a leadership meeting. Some follow-up via email, have a 5-minute discussion after showing it. This conversation is a nice place to plant some questions like “where do we think we are at with this tactic?”.