Learning How to Own It:
Designing a Service Recovery System

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Objectives

- Discuss the impact service recovery has on driving loyalty and trust within your organization

- Recognize the importance of creating a culture that supports service recovery actions through the use of real time feedback service alerts

- Review Sanford's service recovery workflow

- Describe the importance of leader sponsorship on your service recovery journey

Introduction

- Sanford Health

- Largest rural health system in the US

- 47 medical centers

- 2,800 physicians and APPs

- 200 Good Samaritan senior care locations

- World clinics in 8 countries

- 47,700 employees

Sanford Patient Experience Team

- Amanda Schotzko

- Ashley Nelson

- Becky Moch

- Sammi Davidson

- Mikayla Atchison

- Erin Healy

- Darrin Hawley

Vendor Journey

Years prior to 2019: Previous vendor

2019: NRC pilot with 12 locations

June 2020: Transition to NRC

Service Alerts

- Natural Language Processing (NLP)

- Notifies leaders of concerning patient comments

- Comments describing very negative experiences, clinical errors, mistreatment, privacy concerns, requests for a call, intent to never return, legal risks, warning signs, and serious symptoms will be tagged as an alert.
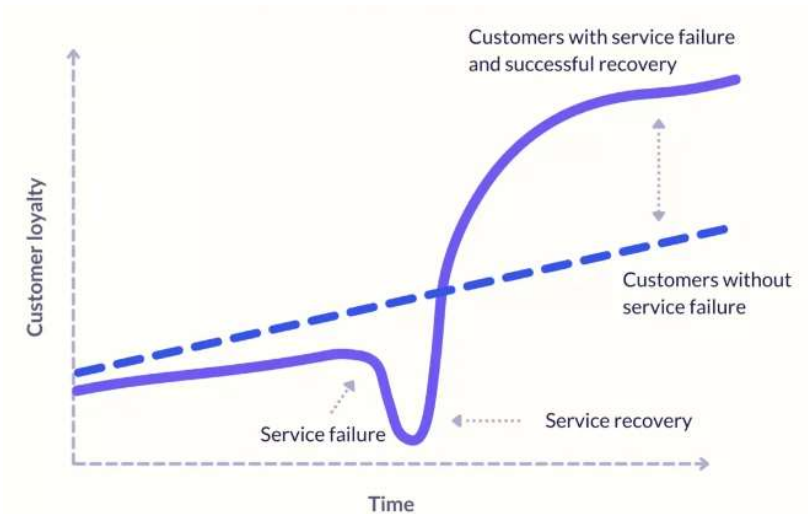
How we figure out customers are dissatisfied

They tell us

They don't come back

Andreassen, T. W. (1999). What Drives Customer Loyalty with Complaint Resolution? *Journal of Service Research*, *1*(4), 324–332. https://doi.org/10.1177/109467059914004
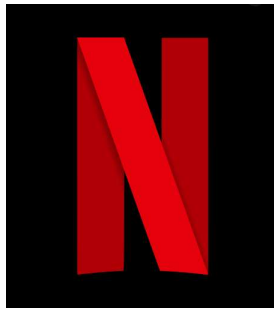
The Service Recovery Paradox

- You will never have a perfect system when you are delivering services

  - "Prepare for failure"

- Service recovery works best when

  - It's not severe

  - It's the customer's first time experiencing failure

  - It doesn't happen often

  - Perception the company couldn't have controlled it

- Loyalty can increase

Magnini, V.P., Ford, J.B., Markowski, E.P. and Honeycutt, E.D. (2007), "The service recovery paradox: justifiable theory or smoldering myth?", *Journal of Services Marketing*, Vol. 21 No. 3, pp. 213-225. https://doi.org/10.1108/08876040710746561

Logo Loyalty

Your competition is the last best experience your patient had—anywhere.

Why Service Recovery Matters

Setting The Foundation for Service Recovery

- Opted for decentralized approach
  - 8 team members for 47 hospitals and 300+ clinics
  - Leaders have access to EMR & relationship with providers
  - Timing is everything to the patient & staff
  - Better visibility for leadership

- No prior expectations to follow up
  - Big change; needed to coach leaders through the change
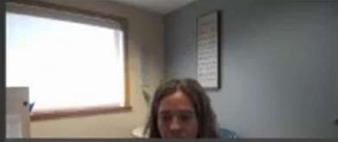
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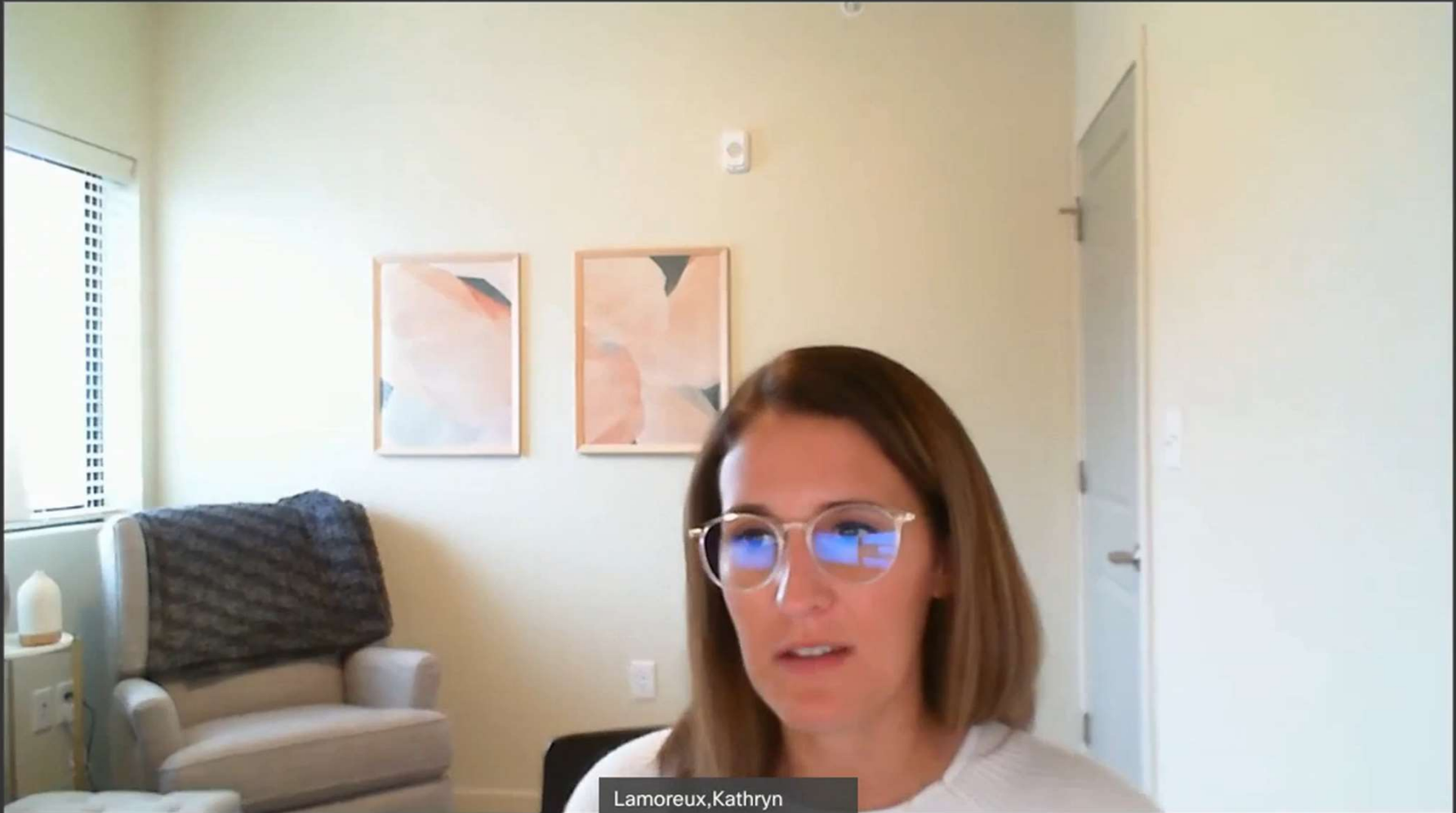
Lamoreux,Kathryn

ADKAR

- **A**wareness

- **D**esire

- **K**nowledge

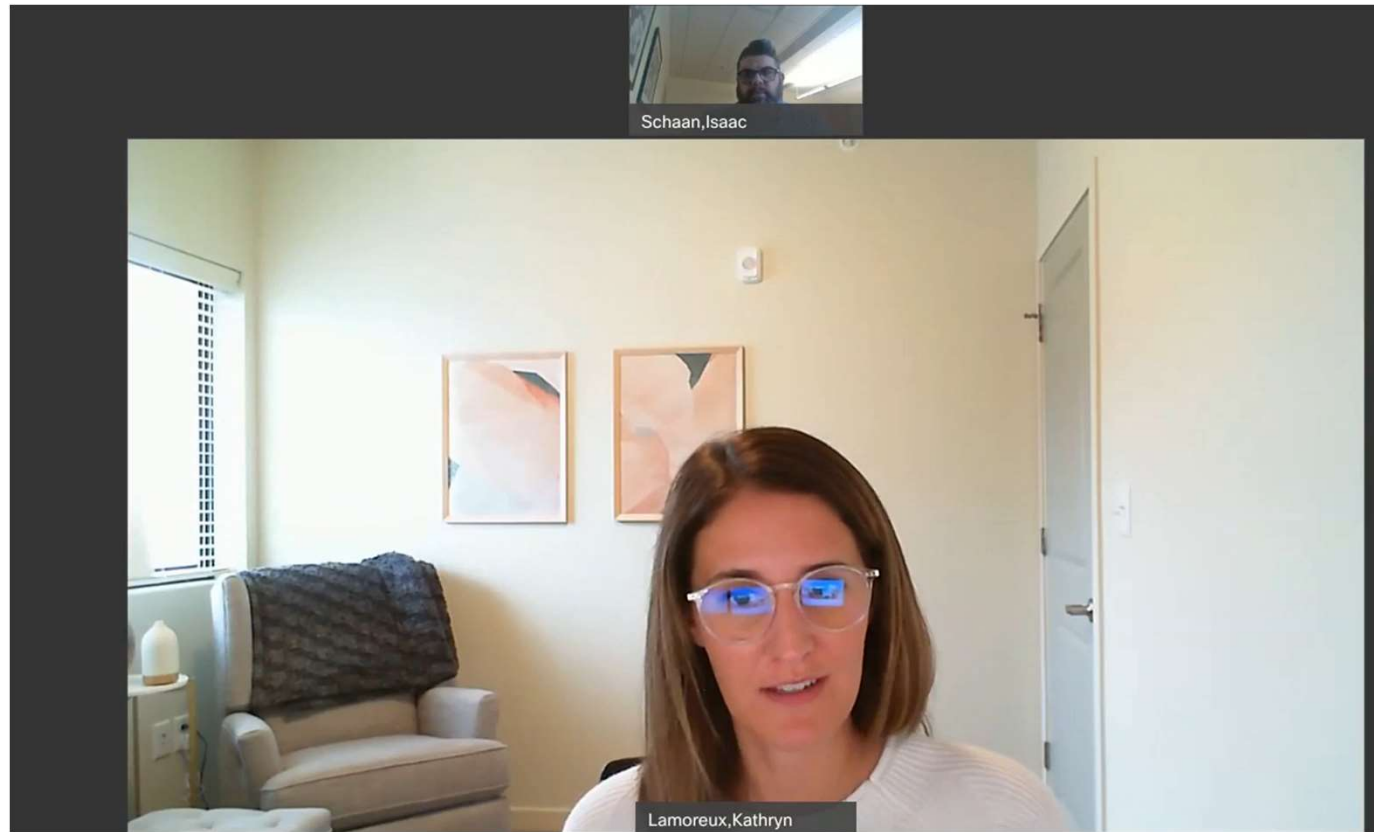- **A**bility

- **R**einforcement

Awareness & Desire

- Awareness
  - Updates throughout the pilot
  - Numerous messages & presentations on why we were making the vendor change
  - Stories in our internet home page
  - Training webinars

- Desire
  - Start with why – share personal stories, make the connection
  - Connect back to ROI when you can
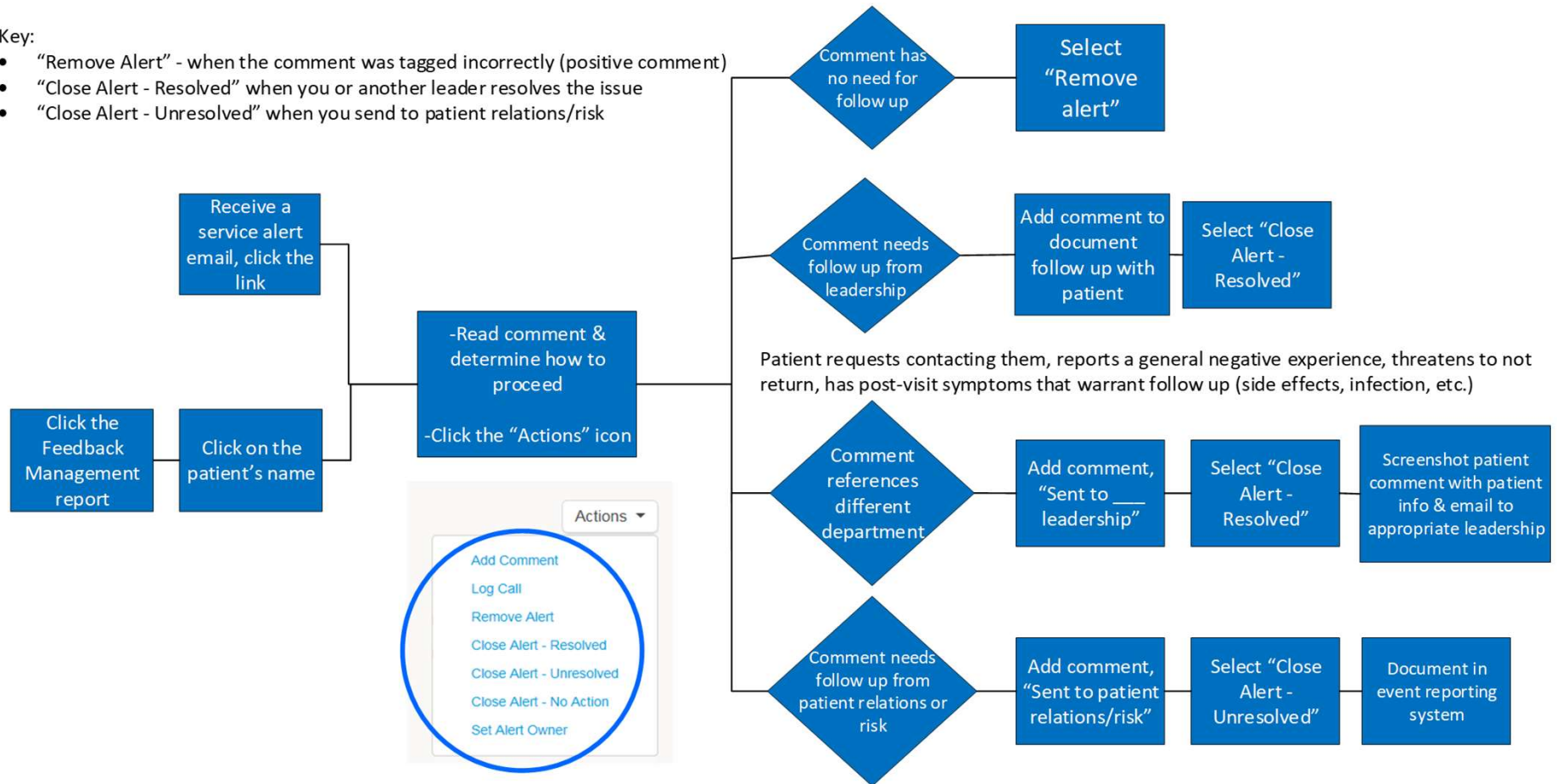 - Connecting it back to our values

Knowledge

Key:
- "Remove Alert" - when the comment was tagged incorrectly (positive comment)
- "Close Alert - Resolved" when you or another leader resolves the issue
- "Close Alert - Unresolved" when you send to patient relations/risk

Click the Feedback Management report → Click on the patient's name → Receive a service alert email, click the link → -Read comment & determine how to proceed -Click the "Actions" icon

Actions ▾
- Add Comment
- Log Call
- Remove Alert
- Close Alert - Resolved
- Close Alert - Unresolved
- Close Alert - No Action
- Set Alert Owner

Comment has no need for follow up → Select "Remove alert"

Comment needs follow up from leadership → Add comment to document follow up with patient → Select "Close Alert - Resolved"

Patient requests contacting them, reports a general negative experience, threatens to not return, has post-visit symptoms that warrant follow up (side effects, infection, etc.)

Comment references different department → Add comment, "Sent to ___ leadership" → Select "Close Alert - Resolved" → Screenshot patient comment with patient info & email to appropriate leadership

Comment needs follow up from patient relations or risk → Add comment, "Sent to patient relations/risk" → Select "Close Alert - Unresolved" → Document in event reporting system

Patient relations: Patient mentions filing a complaint, lawsuits, malpractice, HIPAA violations, informed consent, identity theft, discrimination, allegations of aggression, racism, sexism, abuse

Risk: Patient mentions clinical errors (ie. wrong tests, incorrect diagnoses, allegations caregivers lacked knowledge, failed to review test results or medical records, comments about negligence)

Ability

What Else Re: Experience:

I waited in the room for vitals to be taken for 20minutes. After she left another 20 min for the Dr. I had a 11:30 appt. And did not see the Dr. Until 12:20. Rather unacceptable.

What does the leader *really* want to say?

What does the patient want to hear?

What might they say if they are feeling stressed out?

Ability

Acknowledge

- "Hello, may I please speak with [patient's preferred name]?"
- "This is [insert your name, role, and organization]. I am calling because I received your feedback regarding your experience with us on [date]. Would now be a good time to talk?"

Apologize

- "I am so sorry you experienced this, I can imagine this was frustrating to you.

Address

- "Can you tell me more about what happened?"
- "I really appreciate you sharing your feedback with us. Our goal is to provide exceptional care and service to our patients."
- "Thank you for giving me a chance to resolve this. Based on what you've shared with me, I will…"

Reinforcement

Location	Region	Executive Director	Total # of Surveys Received	# of Service Alerts	# of Alerts Closed	% of Alerts Closed	Average Number of Days to Close	% Alerts Closed within 48 hrs.	Alerts – Previous Month	Alerts Closed – Previous Month	Average Number of Days to Close – Previous
			28	2	2	100.0%	10.8	0.0%	2	2	0.01
			6	1	1	100.0%	1.0	100.0%			
			21	1	1	100.0%	9.9	0.0%			
			181	5	5	100.0%	1.4	80.0%	6	5	2.27
			116	12	12	100.0%	7.4	18.8%	9	9	3.36
			19	2	2	100.0%	1.4	50.0%	2	2	4.81
			65	2	2	100.0%	0.5	100.0%	2	1	0.32
			11	2	1	50.0%	6.1	0.0%	2	2	13.48

Leader sponsorship

"If your boss finds it interesting, you should find it fascinating"

Reinforcement

- Bemidji study
  - Webinars
  - Cohort created (22 leaders overseeing 56 departments)
  - Leader audits by executive directors
    - 5 audits per month of service alerts (are they following the workflow appropriately?)

	Percentage of encounters with service alerts	Open alerts: Closed alerts
Pre improvement (4/25-5/25)	2.4%	26: 27 (51% closure rate)
Post improvement (5/26-6/25)	2.5%	3: 57 (95% closure rate)
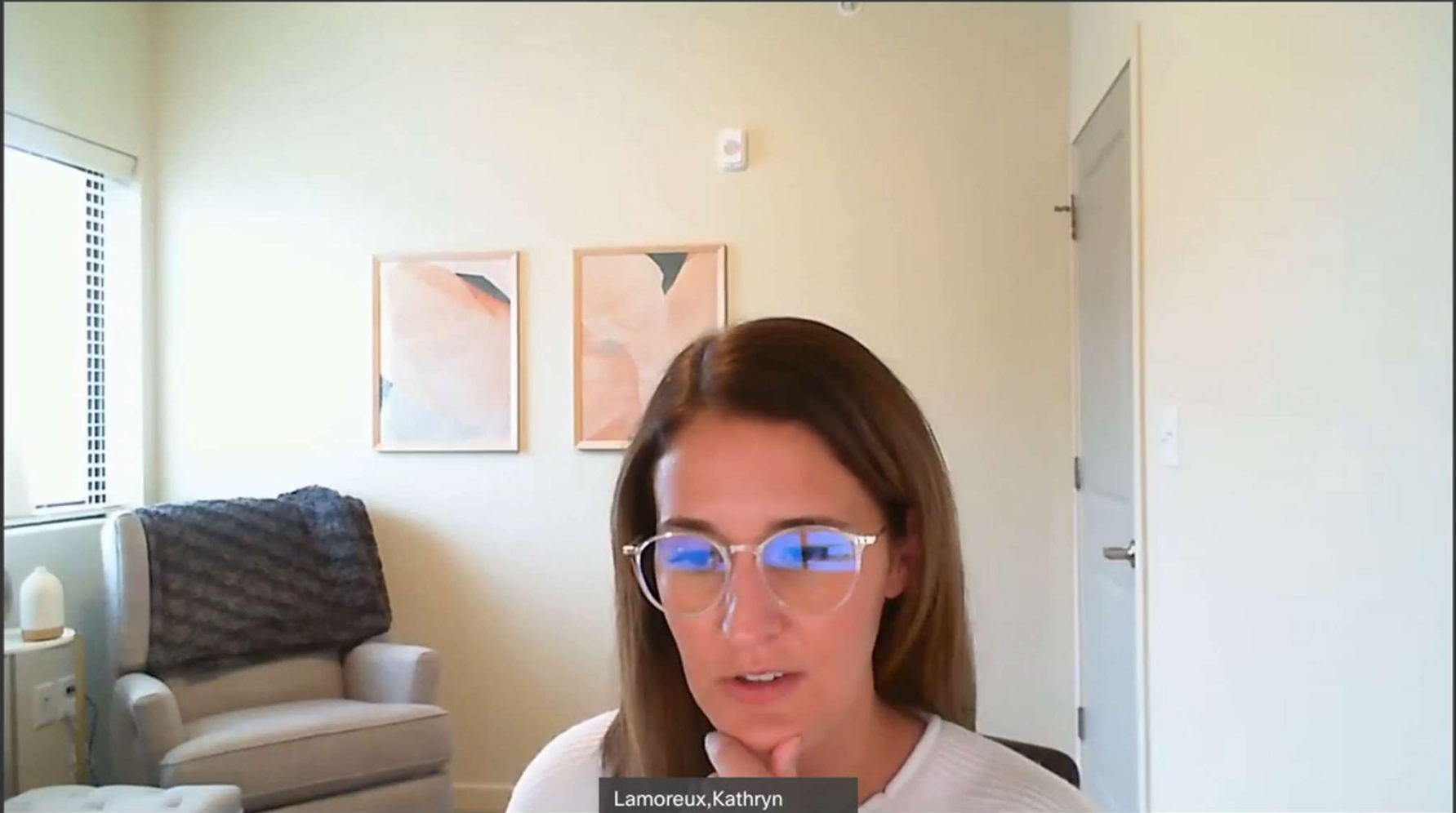
Mission

Metric

Dedicated to sharing God's love through the work of health, healing and comfort.
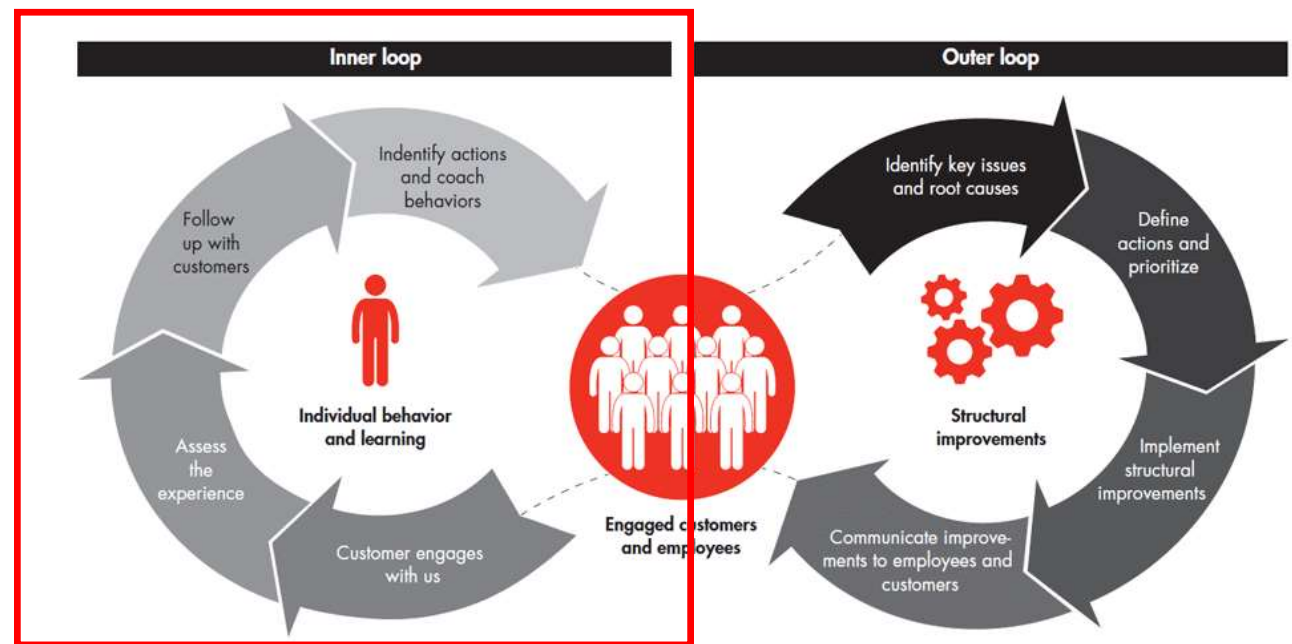
Where We Go From Here

- Continue to refine quality of service recovery & remind leaders of the "why"
- Continue to develop leader sponsorship
- Make the workflow easier to do the right thing
  - Allow for easier assignment of service alerts
  - Less steps to document on service alerts
- Tie to financial ROI
- Start to use data for outer loop feedback

Inner Loop & Outer Loop Feedback

Figure 2: Two feedback loops promote both individual learning and structural improvements

Inner loop

- Indentify actions and coach behaviors
- Follow up with customers
- Assess the experience
- Customer engages with us

Individual behavior and learning

Engaged customers and employees

Outer loop

- Identify key issues and root causes
- Define actions and prioritize
- Implement structural improvements
- Communicate improvements to employees and customers

Structural improvements

Source: Bain & Company

Organizational Assessment Before You Begin

Culture

❑ What level of comfort do leaders have today in conducting service recovery? Do they know the fundamentals of crucial conversations?

❑ What change management model do you want to follow?

❑ Does your executive leadership understand the "why" and are they willing to support it?

Workflows

❑ What are the different avenues patients are providing feedback? (digital, surveys, phone)

❑ Are there other support teams that should inform your process (risk, patient relations)

❑ What time frame is expected for follow up? How is that reinforced?

4 Takeaways

- Service recovery can improve your patient's trust in your organization, ultimately impacting their loyalty and intent to return

- Service recovery is heavily influenced by the culture of your organization & mission

- Make expectations for service recovery clear and easy to complete

- Leader sponsorship will make or break your service recovery efforts – mission over metrics

Questions?

Thank you for attending!

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