Driving Engagement in an Ever Changing Healthcare Landscape

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Rethinking Experience Feedback and Measurement

Patient survey experience concerns are being recognized nationally

NM is on the leading edge of experience surveying, evolving the system’s approach across all stakeholders: patient, employee, and physician.

Executive Summary

Healthcare is evolving rapidly; NM decided it needed a more contemporary approach to gather feedback.

Northwestern Medicine (NM) believes there is a better solution to managing patient, employee, and physician experience consistent with its Patients First mission.

The result of these efforts is a new experience management approach, including a highly flexible technology platform, that enables real-time performance improvement.

As of June 2020, NM continues its transition to the new survey platform.
Northwestern Medicine is a premier integrated academic health system where the patient comes first.

- We are all caregivers or someone who supports a caregiver.
- We are here to improve the health of our community.
- We have an essential relationship with Northwestern University Feinberg School of Medicine.
- We integrate education and research to continually improve excellence in clinical practice.
- We serve a broad community and strive to bring the best in medicine closer to where patients live and work.
High Performing Nationally and Locally

NM is leading the charge not only in patient, employee, and physician experience

<table>
<thead>
<tr>
<th>Hospital</th>
<th>Rank in Chicago</th>
<th>Rank in Illinois</th>
<th>Specialties</th>
<th>Procedures and Conditions</th>
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</thead>
<tbody>
<tr>
<td>Northwestern Memorial Hospital</td>
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<td>No. 1</td>
<td>11 Ranked Specialties</td>
<td></td>
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<tr>
<td></td>
<td>on Honor Roll</td>
<td>in Illinois</td>
<td>2 High Performing Specialties</td>
<td>9 High Performing Procedures and Conditions</td>
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<tr>
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<td>No. 7</td>
<td>1 Ranked Specialty</td>
<td></td>
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<tr>
<td></td>
<td>in Chicago</td>
<td>in Illinois</td>
<td>3 High Performing Specialties</td>
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<td></td>
<td></td>
<td></td>
<td>4 High Performing Procedures and Conditions</td>
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</tr>
<tr>
<td>NM DeNOR Hospital</td>
<td>No. 13</td>
<td>No. 16</td>
<td>1 High Performing Specialty</td>
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<tr>
<td></td>
<td>in Chicago</td>
<td>in Illinois</td>
<td>3 High Performing Specialties</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>4 High Performing Procedures and Conditions</td>
<td></td>
</tr>
<tr>
<td>NM Lake Forest Hospital</td>
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<td>No. 16</td>
<td>1 High Performing Specialty</td>
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<td></td>
<td>in Chicago</td>
<td>in Illinois</td>
<td>3 High Performing Specialties</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2 High Performing Procedures and Conditions</td>
<td></td>
</tr>
<tr>
<td>NM McHenry Hospital</td>
<td>No. 16</td>
<td>No. 19</td>
<td>1 High Performing Specialty</td>
<td></td>
</tr>
<tr>
<td></td>
<td>in Chicago</td>
<td>in Illinois</td>
<td>3 High Performing Specialties</td>
<td></td>
</tr>
</tbody>
</table>

Northwestern Medicine
Typical Patient Survey Process

Standard patient survey processes can result in up to a 1 month delay between a patient visit and receiving feedback.

- 3 Days after Discharge/Visit
  - Patient Records from the System’s EMR Sent to the Vendor

- 6 – 10 Day Lag from the Current Date
  - Digital Patient Response Data Available in the System Data Warehouse

- 10 – 28 Days after Discharge
  - Paper Patient Response Data Available
Typical Patient Survey Process: Vendor Challenges

In addition to a delay in obtaining patient survey data, NM faced challenges with the lack of functionality in the previous survey tool.

Robustness of survey data benefits from a vendor’s ability to…

- Provide **branching driver questions** to patients, employees, and providers based on their scores.
- Administer surveys **other than via paper or email** (e.g. text messages).
- Gather **real-time feedback** (patients) at **various points** of the year (employees and physicians).
Engagement Approach: Guiding Principles

When embarking on the survey change process, NM kept in mind the following guiding principles:

**Address Challenges**
- Provide feedback sufficient to drive specific, timely improvement efforts
- Provide efficient survey experience with an opt in/out ability
- Provide relevant benchmarking capability to give leaders insights
- Streamline time/labor invested in analytics

**Address Business Needs**
- Allow for custom surveys for Magnet, Culture of Safety as needed
- Create cost efficiencies
- Meet regulatory requirements
- Lead to desired outcomes

*Short. Modern. Smart.*
Rethinking Engagement Surveys

To redesign its surveying method, NM needed to make thoughtful changes to many aspects of the surveying process.

**Patients**
- Web or text surveys (except where regulated by CMS)
- Reduce number of questions from 26+ to 3 (with additional questions based on LTR score)
- Improve survey timeline (send within 4 hours of check-in)

**New Platform**
- Refreshed model, constructs, and items
- Ability to conduct surveying in an agile and efficient way
- Use of Net Promoter Score (NPS) for measurement

**Employees/Physicians**
- Ongoing survey process (from annual to quarterly survey send)
- Reduce number of questions from 25 to 2 (with additional questions based on LTR score)
- Enabling of ad hoc surveying (e.g. COVID)
Four Phase Approach

An incremental approach to the survey transition process

**Phase 1:**
- Planning and Research
  - Project Charter Development
  - Defining Business Needs

**Phase 2:**
- Vendor Selection and Contracting
  - Internal and External Research
  - Surveying Processes In and Outside of Healthcare

**Phase 3:**
- Implementation Kickoff
  - Ambulatory and ICC Clinic Survey Launch
  - Employee and Physician Launch March 2019

**Phase 4:**
- Customization and Growth
  - Ongoing Feedback from Leaders and Staff
  - Survey Platform Improvement

FY18 Q4 – FY19 Q1
FY19 Q1 – FY19 Q2
FY19 Q3 – FY19 Q4
FY20 - Ongoing
Summary of the New Survey Platform To-Date
With the launch at the end of FY19, NM is already seeing great results

Current Response Statistics
- 189,381 Patient Comments
- 20,154 Employee Participants
- 759 Physician Comments
- 1,152 Physician Participants
- 12,208 Employee Comments
- 254,278 Patient Surveys

Survey Results Overview
<table>
<thead>
<tr>
<th>FY19 to-date</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Location NPS</td>
<td>&gt;85</td>
</tr>
<tr>
<td>Employee Response Rate</td>
<td>&gt;78%</td>
</tr>
<tr>
<td>Physician Response Rate</td>
<td>&gt;60%</td>
</tr>
</tbody>
</table>

Future State: Continuous Improvement
- Work with clinical leadership to continue to improve workflows and closed-loop feedback approach
- Create operational processes to speed improvement cycle
- Evolve and expand into other clinical areas
- Establish a call center as a new avenue to receive feedback
Patient Survey
Overview
## Patient Survey: Current State

FY20 Ambulatory and ICC Surveying Progress

<table>
<thead>
<tr>
<th>Participants</th>
<th>Responses</th>
<th>Feedback</th>
<th>Follow-Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>500+ locations</td>
<td>260,000+ surveys received</td>
<td>190,000+ comments</td>
<td>2,000+ close-the-loop responses</td>
</tr>
</tbody>
</table>

>50% response rate increase  
>75% comment rate

<table>
<thead>
<tr>
<th>Previous State</th>
<th>Current State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Questions</td>
<td>26+ Questions</td>
</tr>
<tr>
<td>Measurement</td>
<td>5-point LTR Percentile Rank</td>
</tr>
<tr>
<td>Mode</td>
<td>Email, Paper</td>
</tr>
<tr>
<td>Survey Receipt Timing</td>
<td>3 Days</td>
</tr>
</tbody>
</table>

Responses and feedback reflects FY20 data through 5/31/2020

New survey averages less than 3 minutes
**Survey Triggers: Ambulatory and ICC**

Surveys are triggered by a face-to-face encounter with a unique provider identifier.

**Ambulatory:**
- Survey is triggered 4 hours after patient check-in

**Immediate Care:**
- Survey is triggered upon discharge

**Note:**
- Survey triggers falling during quiet hours are sent out the next day
- Patients receive an email reminder 3 days after initial invitation
Sample Text Message Survey Invitation

Text message surveys offer patients a quick and easy way to respond to the new survey

• Survey link included in text message and when clicked immediately opens survey in web browser.

• If patient has a mobile number on file in EPIC, survey will be sent via text. If no mobile number on file, survey is sent via email.
Sample Email Survey Invitation

Patients who do not wish to receive text messages from their health system may opt out and continue to receive surveys via email.

• Email Title: **Please share your feedback - 1-2 minutes**

• Email surveys come from: **Northwestern Memorial Healthcare**

• **LTR clinic question embedded within email invitation** - when patient clicks a rating it opens the survey in a web browser and carries that response forward.

• All reminder surveys are sent via email. Reminders go out 4 days after survey is sent if not yet completed.
Sample Patient Experience Survey Questions

Branching logic for ambulatory clinic survey

1. **LTR Question**
   Open Ended Comments

2. **Driver Questions**
   (only asked if LTR clinic score is ≤ 8)

   To what extent do you agree with the following statements about your visit to NMG CLINIC?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Completely Agree</th>
<th>Do Not Agree At All</th>
</tr>
</thead>
<tbody>
<tr>
<td>My visit was efficient</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>The staff were courteous</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>The team worked well together</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>I’m confident I received the best possible care</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
</tr>
</tbody>
</table>

3. **Driver Questions**
   (only asked if LTR provider score is ≤ 8)

   To what extent do you agree with the following statements about your interaction with PROVIDER NAME?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Completely Agree</th>
<th>Do Not Agree At All</th>
</tr>
</thead>
<tbody>
<tr>
<td>My provider included me in decisions about my care</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>My provider explained things clearly</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>My provider gave me appropriate time and attention</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
</tr>
</tbody>
</table>

¹Immediate care survey has modified LTR provider questions in step three.
Closed Loop Feedback at NM
Leveraged to optimize process for responding to patient feedback; CLF has received positive reactions from leaders

Old Patient Follow Up Process

Manager determines what needs follow-up (Duration: Hours)

Contact patient
Operational change

21-30 days cycle\(^1\)

Call

> 1,600 comments weekly

New Patient Follow Up Process

> 2,700 comments weekly

CLF Tool

Few Key Focus Areas

- Negative Experience (Phase I)
- “Call Me” (Phase II)
- “No survey” (Phase II)

Contact patient

Email

No action needed

24-72 hours cycle\(^2\)

Operational change

Call

Patient received survey 3-7 days post visit; comments sent on average 21 days post visit;

Patient receives survey 4 hours post visit or upon checkout; alert triggered once patient completes the survey
Next Steps: Patient Roadmap

Goal: Implementing a modern survey platform to continue transforming the patient, employee, and physician experiences

**Study**

FY19: Gathered requirements, studied cross-industry best practice, and evaluated contemporary tools sets

**Implementation**

FY20: Implementing redesigned surveys and reporting platform across all customer groups

**Improvement**

FY21: Establish long-term Net Promoter Score goals and outline future state spread across the system
Employee and Physician Survey
Overview
# Employee and Physician Survey: Current State

**FY20 Physician and Employee Surveying Progress**

<table>
<thead>
<tr>
<th>Participants</th>
<th>Responses</th>
<th>Feedback</th>
</tr>
</thead>
<tbody>
<tr>
<td>System-Wide Participation 26,000+ Employees 1,600+ Physicians</td>
<td>20,000+ Employee 1,000+ Physician surveys received</td>
<td>12,000+ Employee 750+ Physician comments</td>
</tr>
</tbody>
</table>

- **78% employee and 60% physician response rate within 1 week of survey send!**

<table>
<thead>
<tr>
<th></th>
<th>Previous State</th>
<th>Current State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Questions</td>
<td>25 Questions</td>
<td>2 Questions with Branching Logic and 10 Employee Driver Questions</td>
</tr>
<tr>
<td>Measurement</td>
<td>5-point LTR Percentile Rank</td>
<td>10-point LTR Net Promoter Score</td>
</tr>
<tr>
<td>Mode</td>
<td>Email</td>
<td>Email</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual Pulse Check</td>
<td>Quarterly, Ad-Hoc (e.g. COVID-19 response)</td>
</tr>
</tbody>
</table>

**Note:** Only 1 Employee/Physician Survey has been completed to-date, serving as the inaugural benchmark survey. The next survey, set for June 2020, has been delayed due to COVID-19.
Sample Employee Survey Questions
Condensed portion of the survey; branching and drivers

1. LTR Question
   Open Ended Comment Box

2. Flex Question (only asked if LTR score from page 1 is 9 or 10)
   Do you have time to answer a few more questions?
   - Yes
   - No
   Continue to
   - Question 3

3. Questions (only asked if LTR score from page 1 is ≤ 8 or answer to question on page 2 is “Yes”)
   Thank you for your feedback – it makes us better. To what extent do you agree with the following:
   - I have the tools and resources to do my job
   - My team works well together
   - I have input into decisions that affect my daily work
   - I am recognized appropriately for doing great work
   - I would recommend my manager as a person to work for

Begin Survey  Back  Next
Employee/Physician Feedback Loop

Engagement is a continuous process, requiring commitment from one’s manager and the organization.

- **Feedback**: Responding to the survey
- **Analyze Performance**: Noting where either structured data or commentary is pointing to a particular issue (e.g., communication, relationships)
- **Identifying Trends**: Sharing trends and insights from the data
- **Share Findings with Team**: Collaborative process for next steps
- **Taking Action for Improvement**: Sharing results and holding discussions

**Employees and Physicians**
- Responding to the survey

**Teams**
- Collaborative process for next steps

**Managers**
- Sharing results and holding discussions

**Leaders**
- Sharing trends and insights from the data

**HR**
- Noting where either structured data or commentary is pointing to a particular issue (e.g., communication, relationships)
Next Steps: Employee and Physician Roadmap

Goal: Implementing a modern survey platform to continue transforming the patient, employee, and physician experiences

**Study**  
**FY19:** Gathered requirements, studied cross-industry best practice, and evaluated contemporary tools sets

**Implementation**  
**FY20:** First quarterly survey sent out to employees and physicians in March 2020; launch ad hoc COVID survey; second quarterly survey cycle

**Improvement**  
**FY21:** Outline future state roadmap to improve Net Promoter Scores and continue to transform the organization
New Platform Provides Agility
Survey enhancements brought on by COVID-19

**Patients:**
Telehealth Survey

<table>
<thead>
<tr>
<th>Telehealth by the Numbers</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitations Sent</td>
<td>&gt;13,000+</td>
</tr>
<tr>
<td>Average LTR NPS</td>
<td>&gt;90</td>
</tr>
</tbody>
</table>

During COVID-19, care delivery shifted to a telemedicine model. Current surveys were providing mixed results, so NM worked to develop a telehealth-specific survey to understand these patients’ experience.

**Employees/Physicians:**
COVID-19 Response Survey

**FOCUS SURVEY:**
COVID-19 Response and Reactivation

Survey feedback will help inform NM’s COVID-19 response and reactivation efforts as well as future crisis planning.
Summary

A new era of patient, employee, and physician engagement measure at NM

- Rapid data collection and analysis
- Alerts, text analytics, and closed-loop feedback
- NPS score: on par with organizations outside of healthcare
- Rapid piloting of new surveys: e.g. telehealth
- Ongoing system-wide improvement efforts
- Regular employee & physician feedback

Short.

Modern.

Smart.