

PREVIEW GUIDE



Table of Contents:

Sample pages from Leader's Guide.....pgs. 2-10
Program informationpg. 11

Workshop Purpose

We hope your group's involvement with the video and related activities in this workshop will lead to some important realizations in your practice:

- The services surrounding the delivery of health care are of critical importance to our patients. It is how they judge a large part of the quality of care received.
- Each encounter with a patient represents a "trust point" in which you either build the patient's trust in you, or lose their trust.
- Good communication - active listening and responding - is a critical part of delivering quality health care.

Patient-oriented health care service is everyone's responsibility. Patients are customers, and customers are the key to an organization's success.

Workshop Objectives

After completing this workshop, participants will be able to:

- Describe the relationship between patient care, clinical interaction, and organization/practice success.
- Review typical patient interactions and identify trust points.
- Examine trust points and develop ways to improve the patient experience.
- Review a list of steps that clinical staff can take to improve patient interactions after the workshop.

Who Should Attend?

CRM Learning's *It's a Dog's World* workshop is designed for clinical management and staff, who are encouraged to attend in "mixed group" sessions.

Note: The design of the workshop assumes that all participants are from the same organization.

Group Size

Workshop material should be presented in a group setting where the responses of others can be shared. We recommend limiting the group to no more than 12-16 participants to promote active discussion of the workshop topics.

Self-Study

This workshop material may be used as a self-study activity, as the video and Trust Point worksheet will be of value to anyone who reviews them.

Training Design

The workshop kit has everything you'll need to conduct a fast-paced and effective 2-hour workshop to improve your team's patient care focus.

- The **video** (DVD) presents a dramatic (and humorous) point-of-view of two very different interactions experienced by Bob and his dog, Max. The video will be the kickoff point for your discussions and other activities.
- The **Presentation Script** in this Leader's Guide outlines the learning points and activities. Activities and structured discussions help participants explore their own beliefs and develop new strategies for improved patient care.
- The **Participant Handouts** (PDF on the enclosed CD-ROM) provide worksheets and note pages for completing the activities.
- A **PowerPoint** presentation (on the CD-ROM) includes slides to support the scripted presentation.
- A **Reminder Card** (10 copies) provides rapid access to some of the key points and strategies covered in the workshop.
- Your kit also contains 1 paw-print lanyard.

The training design runs about 105-120 minutes, depending on the depth of discussion. Workshop leaders are encouraged to add or remove activities from the overall plan to meet specific needs or time constraints.

Workshop Segment	Time	Handout
Workshop Introduction Welcome, Introductions, Purpose, and Objectives.	15	Pages 1, 2
Activity 1: Video: It's a Dog's World, 2nd Edition Follow Bob and his dog, Max, to their respective health care providers – enjoy the differences in how they are treated.	15	
Debrief the Video Review and discussion questions on video	10	
Activity 2: Defining Trust Points Review the definition of "trust point", and discuss other factors central to improving patient care.	5	Page 3
Activity 3: Trust Point Exercise Examine the trust points in your practice and find ways to improve patient care.	30	Page 4
Debrief the Trust Point Exercise Review each group's recommendations for improving trust point interactions.	20	

Workshop Segment	Time	Handout
Back at Your Desk Review activities that will be completed after the workshop, including the follow-up e-learning activity.	5	Reminder Card
Optional Activity Use the optional discussion questions for managers or all participants to expand the workshop value.	TBD	
Close the Session Review the main points discussed in the workshop.	5	
Total Time*	105	

*Expanded discussions may increase session time.

Background

CRM Learning's *It's a Dog's World* workshop is based on some consistent and ongoing trends and facts of life in the healthcare industry.

Patients don't care how much you know until they know how much you care.

Patients are the foundation of all health care organizations - doctors' offices, surgery centers, hospitals, diagnostic centers, laboratories, pharmacies and health insurance companies. Our efforts should be focused on meeting the needs of our patients by providing the best technical care possible.

But patients are tired of long waits for a three-minute exam. They don't like technicians who approach them with icy hands and attitudes. They resent the feeling that everyone else's schedule is more important than their own.

Patients have changed.

Patients are no longer quiet and obedient. While most patients are still reluctant to complain about service directly to their physician or to office staff, they are not shy about responding to patient satisfaction surveys or letting their friends know how frustrating their visit might have been.

Industry surveys have indicated the obvious:

- There is a strong relationship between communication and patient satisfaction.
- Patients expect care, concern and courtesy from staff and will evaluate the doctor and the practice accordingly.
- Patients will change doctors if they are dissatisfied.
- We live in an impatient, overworked, and stressed society, and our expectations about health care are consistent with and affected by that state of mind: patients want to be treated quickly, while at the same time, health care staffs are overwhelmed by increasing volume.

Workshop Follow-Through

We've all been to training sessions where the energy is high, the progress is tangible, and everyone leaves with new skills and resolve for making changes. And we've all seen how the grind of daily activity can quickly take the edge off new awareness and skills.

Follow-through is the best way to ensure that workshop participants continue their newly reinforced focus on improved patient interaction. You can do this through regularly scheduled meetings, e-mail updates on patient care initiatives, and follow-up meetings with your fellow clinicians/staff.

- Make arrangements to **replay the video** for the benefit of management and staff who could not attend the training.
- Use the **Trust Point worksheet** to explore ways to improve your practice on a continuing basis. You can reprint the worksheet and note pages from the enclosed CD-ROM.
- Use the **Reminder Card** to stimulate thinking and broaden adaptability.
- To help trainers ensure that this training “sticks” and really changes behavior, CRM Learning created a unique **follow-up e-learning module** to accompany *It's a Dog's World, 2nd Edition*. Five (5) free e-learning user accounts were included with your purchase of the video program (see insert in your kit for passcodes and instructions for accessing the e-learning). If you purchase additional follow-up e-learning user blocks for your trainees, email trainees the link to access the module 2-6 weeks after training. Use the reporting function of the program to track your trainees' progress and view their pre- and post-course test scores.

Time to Begin!

Now you're ready to begin your presentation of CRM Learning's *It's a Dog's World* workshop.

Complete your review of the materials and enjoy the session. We're sure you'll gain some valuable insights about your organization as you prepare for and conduct the workshop!

Presentation Script

This workshop is a 120-minute experience for participants at all levels in the healthcare field, using video, group discussion, and related activities to provide a new perspective on patient care. The workshop will help management and staff identify “trust points” where patient trust and experience can be improved, while staying in synch with the requirements to keep both practice and patient thriving.

Optional activities based on the makeup of your participant group will add 10-20 minutes. The Back at Your Desk activity provides e-learning and other materials to reinforce the concepts presented during the workshop.

Note: Please hand out the Worksheets when they are needed and not all at once at the start of the workshop.

Welcome: Purpose of Workshop and Expected Outcomes

Time: 15 minutes



SHOW SLIDE 1: WORKSHOP TITLE



INTRODUCE yourself and make a brief comment about the natural conflicts in wanting to provide better patient care while trying – at the same time - to meet the requirements of the business side of the practice.

ASK

Allow a very brief discussion of the following three related questions:

- What is it like for a patient coming to our office or facility for a visit?
- Are we doing everything we can to make our patients comfortable when they come for an appointment or stay with us?
- How do we know?

SAY

- Trust points involve contact with our patients by phone, in person, by email, by any means.
- Trust points are an opportunity for the patient to learn something about us as an organization, and about us as individuals.
- Every trust point is an opportunity to build the patient's trust or lose it.
- The best trust points leave a positive impression on the patient. We are not interested in simply being neutral, and we need to learn to avoid interactions that can lead to a negative result.

The quality and value of the patient experience is, to large extent, up to you.

Ask the participants if they have any comments about these definitions.



SHOW SLIDE 4:CONNECT WITH PATIENTS

Connect With Patients

- Make a good first impression.
- Try to anticipate the patient's needs, and understand and clarify their expectations.
- Talk to your patients – tell them what you are doing for them and what happens next.

It's a Dog's World

SAY

- Make a good first impression.
- Try to anticipate the patient's needs, and understand and clarify their expectations under highly stressful conditions.
- Talk to your patients – telling them what you are doing for them and what happens next.

Activity 3: Trust Point Exercise

Time: 50 minutes

Introduce the Activity

SAY

The points on these past few slides are noble goals, and I know we all share them. But we can't go from where we are today to an ideal world in one step.

Still, we have to start somewhere, and the best place to begin is by taking a look at our own organization and the procedures we use for patient care.



FLIPCHART

Let's examine our practice by breaking it down into four main phases of the patient care experience (write these on the flipchart):

1. **Check-In** – from the time they make an appointment or walk in the door.
2. **Procedure or Visit** – the actual clinical interaction we have with a patient and the patient's reason for coming to us.
3. **Recovery and Follow-up** – this can be as complicated as post-surgery or as simple as providing test results or calling in a prescription.
4. **Behind-the-Scenes** – insurance processing, setting appointments, transferring files, matching forms, calculating costs, arranging for home medical equipment, etc.

Each of these phases provides a series of trust points with our patients – so each one has plenty of opportunities for us to fail or succeed.

Completing the Trust Point Activity

SAY

Over the next 45-50 minutes, we are going to take a close look at the trust points in our practice, and how we interact with and relate to our patients through them.

This will be a small group activity, with each group discussing one of the four phases of the patient care experience.

When you are done, I'll ask you to report back to the full group on the trust points you have identified.

Key Points for Improved Patient Care

Trust Point Definitions

- Trust points involve contact with our patients by phone, in person, by email, by any means.
- Trust points are an opportunity for the patient to learn something about us as an organization, and about us as individuals.
- Every trust point is an opportunity to build the patient's trust or lose it.
- The best trust points leave a positive impression on the patient. We are not interested in simply being neutral, and we need to learn to avoid interactions that can lead to a negative result.

Connect

- You need to make a good first impression.
- You have to try to anticipate the patient's needs, and understand and clarify their expectations under highly stressful conditions.
- And, you need to talk to your patients – telling them what you are doing for them and what happens next.

Own the Experience

- Give your undivided attention to each patient.
- Ask for and obtain feedback during the time you are with the patient. Fix any problems quickly and thoroughly.
- Keep it simple – choose language they can understand. Don't exclude the patient by speaking to a coworker in lingo or a language the patient cannot understand.
- Follow through – provide what you promise and what is expected.
- Be dependable and do things in a timely manner. Do it right the first time.

Show you Care

- Use active listening – summarize and repeat back what a patient tells you.
- Be aware of your body language and tone of voice – and your patient's!
- Don't let technology or paperwork become more important than the patient.
- If mistakes happen, gain an understanding of the problem, show empathy, and work to see the mistake is resolved – don't just pass it along to someone else.

Phase _____

Trust Point Worksheet

1. Trust Point What are the trust points between staff and patients in this phase?	2. Patient Need(s) What does the patient expect at each point?	3. Practice Need(s) What do we need in our practice at this point (include technology requirements)?	4. What we need from each other What are the trust points between staff members in each phase? What do we need from each other?	5. How can we make things better? How can we improve the patient experience for this trust point?

Materials Included With *It's a Dog's World, 2nd Edition*

The workshop designed to accompany the video-based program offers a short, flexible training design. The Leader's Guide includes all the directions you'll need to run the program plus suggestions to make it more involving for participants:

- ◆ The **chaptered DVD** of *It's a Dog's World* provides the dramatic vignettes to illustrate the workshop topics. The video tells the parallel stories of Bob, a healthcare patient with a hurt shoulder, and his dog Max, visiting the veterinarian for a hurt paw. Each of our two patients is treated differently by their healthcare personnel. As well as the updated version you will also have *It's a Dog's World, 1st Edition* on the DVD. Both videos are closed-captioned.
- ◆ The **Leader's Guide** provides step-by-step instructions for introducing activities, leading discussions, and making transitions between the video, group discussions, and exercises. Featured in the facilitation are sub-topics such as **Trust Points**, **Connect With Patients**, **Own the Experience** and **Show You Care** to make the training more meaningful and memorable as participants return to caring for their patients.
- ◆ The accompanying PowerPoint Presentation helps facilitators in emphasizing training and discussion points throughout the workshop.

Also included are PDFs of the Participant Worksheets.

