CREATING A CUSTOMER-DRIVEN CULTURE

Health Foundation
for Western & Central New York
Investing in Better Health for People and Communities

HITTING THE MARK FALL CONFERENCE

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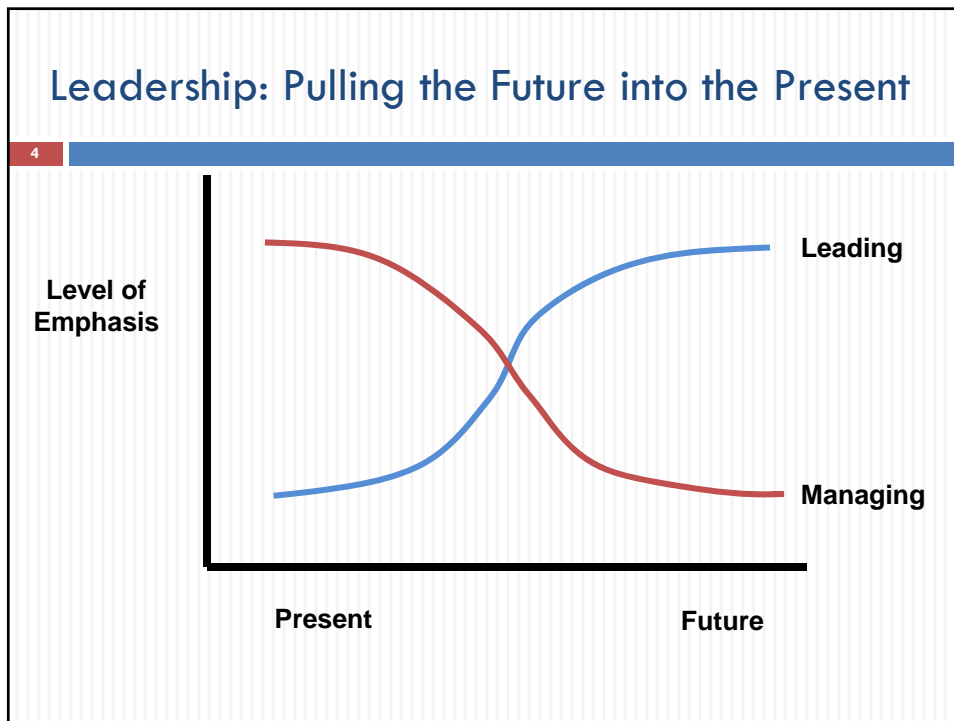
November 12-13, 2013

Change & Transformation in Health Care

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- What types of changes is your agency/organization experiencing that are most directly affecting the role of customers /clients /patients?

- What is most challenging when it comes to making your agency/organization more "customer-driven"?

  Have a scribe at your table capture responses and reporter ready to share with the group

Leadership Produces change and movement	Management Produces order and consistency
1. Establishes direction ▪ Creates a vision ▪ Clarifies the big picture ▪ Sets strategies 2. Aligns people ▪ Communicates goals ▪ Seeks commitment ▪ Builds teams, coalitions and alliances 3. Motivates and inspires ▪ Energizes ▪ Empowers subordinates & colleagues ▪ Satisfies unmet needs	1. Planning and budgeting ▪ Establishes agendas ▪ Sets timetable ▪ Allocates resources 2. Organizing and staffing ▪ Provide structure ▪ Make job placements ▪ Establish rules and procedures 3. Controlling and problem solving ▪ Develop incentives ▪ Generate creative solutions ▪ Take corrective action

Source: Kotter, J. (2001). What Leaders Really Do. *Harvard Business Review,* September.

Leadership: Pulling the Future into the Present

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Level of Emphasis — Leading — Managing — Present — Future

Objectives/Agenda

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- ❑ Identify the characteristics of high performing customer-driven organizations
- ❑ Learn a highly applicable framework for transforming to a more customer-driven culture
- ❑ Begin (continue) your leading change efforts through a set of application exercises that you can continue with your team

Southwest Airlines

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The mission of Southwest Airlines is dedication to the highest quality of Customer Service delivered with a sense of warmth, friendliness, individual pride, and Company Spirit.

NATIONAL BESTSELLER

NUTS!

"Our People are our single greatest strength and most enduring longterm competitive advantage."
- Gary Kelly, CEO Southwest Airlines

Zappos

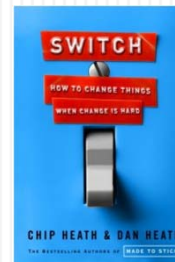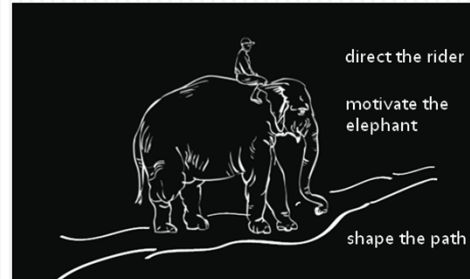## Customer-Driven Organizations: Identifying Characteristics

- ☐ Customer service core to their identity/ mission
- ☐ Approach to customer service developed from within
- ☐ Have engaged, proactive and committed teams that deliver excellent service
- ☐ Leaders empower, promote change and adaptability and lead with humility

Three Surprises About Change

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- ❑ What is seen as resistance, is often a lack of clarity (direct the rider)
- ❑ Change requires appealing to both minds AND hearts (motivate the elephant)
- ❑ Changing the situation can be more powerful than changing the person (shape the path)

direct the rider

motivate the elephant

shape the path

SWITCH
HOW TO CHANGE THINGS
WHEN CHANGE IS HARD

CHIP HEATH & DAN HEATH
The Bestselling Authors of MADE TO STICK

Direct the Rider

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100,000 Lives Campaign

Destination Post-Card: Application

Destination postcards: Shows the Rider where you are headed and the Elephant why the journey is worthwhile

- ❑ **What is a potential "destination post-card" for excellence in service to patients/ clients/ customers for your team?**
- ❑ **Share with a partner and give each other feedback**

Direct The Rider

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- ❑ **Find the Bright Spots**
  - ❑ What are the exceptions to the problem you are trying to change?
  - ❑ Study them
  - ❑ Scale the successes
  - ❑ Place to jump start change

Direct The Rider

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- ❑ **Challenge**: How to reduce turnover among nurses?
- ❑ **Bright Spot**: Identify the exceptional nurses who were <u>staying</u> – what is unique about them?
  - ❑ *Insight*: Professional identity is key to longevity
  - ❑ *Leverage the Bright Spot*
    - ❑ New recruitment and orientation programs
    - ❑ Mentorship programs
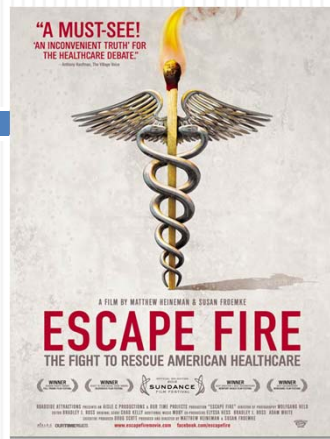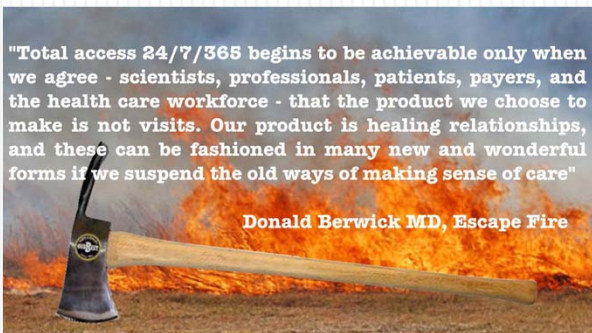   - ❑ Recognition programs

Lovelace
Health System

Escape Fire Concept

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"Total access 24/7/365 begins to be achievable only when we agree - scientists, professionals, patients, payers, and the health care workforce - that the product we choose to make is not visits. Our product is healing relationships, and these can be fashioned in many new and wonderful forms if we suspend the old ways of making sense of care"

Donald Berwick MD, Escape Fire

"A MUST-SEE!
'AN INCONVENIENT TRUTH' FOR
THE HEALTHCARE DEBATE."

A FILM BY MATTHEW HEINEMAN & SUSAN FROEMKE

ESCAPE FIRE
THE FIGHT TO RESCUE AMERICAN HEALTHCARE

Bright Spot Strategies

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❑ **The "Miracle" and "Exception" Questions**

  ❑ Imagine that you arrive to work tomorrow and find clear evidence of your "destination post-card" starting to be realized….

    ❑ What would be the first visible sign?

    ❑ When was the last time that you saw evidence of that?

Bright Spots: Application

- Share your identified service "bright spot" with your team. Invite them to help sharpen the description and understanding of the bright spot.
- Ask the team to identify other "bright spots"
  - What 2-3 "bright spots" seem to offer the best opportunities to scale (i.e., you can learn something from them and replicate them)?
  - These as potential places to initiate customer service improvements

Direct The Rider

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❑ **Script the Critical Moves**
  ❑ What are the key behaviors for achieving service excellence?
  ❑ Minimize choices (Note: not autonomy)

Ritz-Carton's <u>Three Critical Service Steps</u>

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1. Provide a warm and sincere greeting

2. Anticipate and strive to fulfill each guest's needs

3. Provide guests with a fond farewell (sincere good-bye and use the guest's name)

Critical Moves: Application

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- ❑ With your team, identify one critical area that significantly impacts customer service.
- ❑ What are the key behaviors for achieving excellent service in this area?
- ❑ What are 3-5 steps that can be identified that if followed would significantly improve the quality and consistency of service? (Jump Starts)
- ❑ Identify longer-term Critical Moves necessary for realizing your Destination Postcard
  - ❑ Mid-range (next 12 months)
  - ❑ Long-term (next 2+ years)

Motivate the Elephant

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Motivate the Elephant

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- **Traditional approach**
  - Analyze, think, change

- **Find the Feeling**
  - Defines a purpose that resonates emotionally
  - See, **FEEL**, Change

Power of Customers to Motivate

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- ❑ Impact
- ❑ Appreciation
- ❑ Empathy

Source: Grant, A. 2011. How Customers Can
Rally Your Troops Harvard Business
Review, June: 97-103.

Using Customers to Engage the Team

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- ❑ Set up events and meetings where patients/clients/customers can share their experiences
- ❑ Seek out new stories (e.g., RCs' "wow" stories)
- ❑ Find internal customers
- ❑ Turn staff/team into customers
- ❑ Recognize high-impact contributions through peer recognition

Source: Grant, A. 2011. How Customers Can Rally Your Troops Harvard Business Review, June: 97-103.

Motivate the Elephant

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❑ **Grow Your People**
- ❑ Make the change around identity
- ❑ Build a growth (learning) mindset

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Organization's Performance

What We Expect

Current

Change Initiative

What Actually Happens

Valley Of Despair

Time

Shrink the Change

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❑ Motivates by making goals seem more achievable

❑ Start small and look for quick wins

❑ Show and remind of progress

Grow Your People & Shrink the Change: Application

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❑ What is an identity that your team aspires to that can help support a customer-driven culture? How might you build this identity?

❑ Identify one small win (and immediate actions necessary to achieve it) that could be taken toward your change. Think in terms of:

  ❑ Can be used to point to initial progress

  ❑ Will help build momentum

Shape the Path

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Shape the Path

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❑ **Tweak the environment**

❑ **Build good habits**

❑ **Rally the herd**

Shaping the Path: Application

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❑ Identify potential ways you might be able to support the change that you have identified by (one or more of the following):

❑ Make small changes to the work environment (e.g., rearrange waiting room space; flow of patients/ clients and staff)

❑ Build good habits that reinforce desired behaviors (e.g., check lists, reporting tools)

❑ Rally the herd (e.g., involve key opinion leaders; start groups (e.g., "lunch and learns") where supporters of the change can meet)
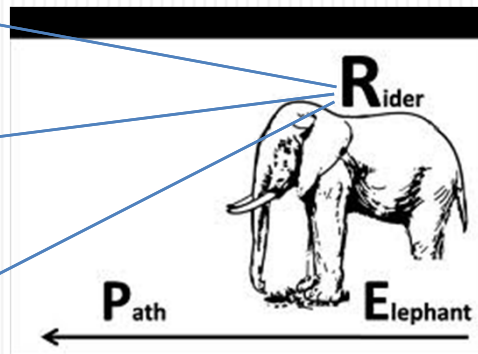
Directing the Rider

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Bright spots: Drawing attention to bright spots brings hope and optimism

Point to the Destination: Giving a clear and engaging goal inspires effort

Script the Critical Moves: Clarifying what the team needs to focus on and prioritize provides the team clarity
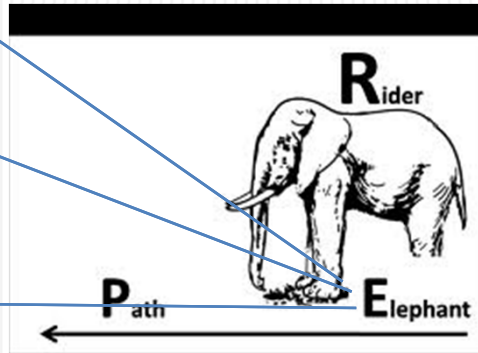
Motivating the Elephant

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Find the Feeling: Defines a purpose that resonates emotionally

Shrink the Change: Smaller, achievable goals with visible results builds confidence in the team

Grow Your People: Building a team identity and a mastery-mindset motivates the team to look at change as an exciting opportunity
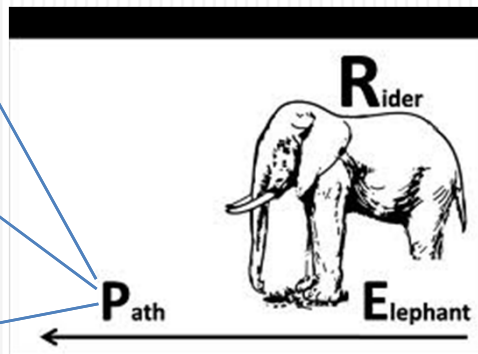

Shaping the Path

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Tweaking the Environment: Small changes to what your team experiences can produce big changes in behavior

Build and Reinforce Habits: Good habits that are reinforced make the right behaviors routine

Rally the Herd: attitudes and behavior are contagious—the more others support the change, the more likely dissenters are to join in

Thank You!

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References/Resources

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- Escape Fire (movie and related change-related resources) http://www.escapefiremovie.com/