



HIMSS17 WHERE THE **BRIGHTEST MINDS** IN HEALTH AND IT INSPIRE ACTION

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ORLANDO | ORANGE COUNTY CONVENTION CENTER

Rounding Like You Mean IT

Session 162, February 22, 2017

Santosh Mohan, Health Care IT Advisor At-Large

Lisa Grisim, VP and Associate CIO, Stanford Children's Health

Today's Presenters

WHERE THE
BRIGHTEST MINDS
IN HEALTH AND IT INSPIRE ACTION

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Lisa Grisim, RN MSN
VP and Associate CIO
Stanford Children's Health



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Acknowledgements

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Conflict of Interest

WHERE THE
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IN HEALTH AND IT INSPIRE ACTION

Santosh Mohan, MMCI, CPHIMS, FHIMSS

Has no real or apparent conflicts of interest to report.

Lisa Grisim, RN, MSN

Has no real or apparent conflicts of interest to report.

- 1 **Context and Purpose**
- 2 **Approaches and Techniques**
- 3 **Case Studies and Results**

Learning Objectives

WHERE THE
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IN HEALTH AND IT INSPIRE ACTION

- Recognize the purpose of rounding for IT Services and role it plays in building loyalty and credibility
- Formulate a value creating rounding process with the right balance of empathy and follow-through
- Identify rounding techniques to boost user satisfaction, build trust and relationships and deliver a premium experience
- Discuss ways to enhance tracking and follow up of incidents, enhancement requests and workflow issues



Value Suite STEPS™:

Satisfaction and Savings

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- Clinician satisfaction reflected in higher Net Promoter Scores
- Higher service quality and reduced frustration levels
- Enhanced credibility for the IT department
- Higher employee engagement scores



- Time savings from faster resolution of incidents and workflow related requests
- Reduced calls to the service desk
- Customer service cost savings (lower complaint costs, overtime costs etc.)



Road Map

- 1 **Context and Purpose**
- 2 Approaches and Techniques
- 3 Case Studies and Results

A Very Different World Today...

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Forces of Change in the Digital Transformation Age

1

Complexity of
technology is
increasing

Modern IT landscapes are increasingly complex; CIOs must help organizations embrace new tools at an unparalleled pace, and at the same time manage legacy technologies.

2

New demands on IT to
deliver a **consumer
like experience**

Demands from end users who often have access to better technology outside the workplace have never been higher, creating a constant threat of Shadow IT.

3

Business is
expecting IT to be
more **strategic**

Expectations from the business for digital transformation grow. Organizations relying on IT to track and improve quality and safety metrics and to offer new ways of care delivery.

Rising Importance of the “Customer”

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Customer Centric Mindset a Must to Thrive in the Digital World

Technology, although crucial, is just a tool. Any organization that wants to make the most from systems and services must focus on the people that will use IT. To meet this aim, the **modern IT department must be customer-centric.**

Source: “The customer-centric IT department – putting experiences at the core of strategy”, *Digital Leaders Blog of BCS, The Chartered Institute for IT*, June 2016, available at <http://www.bcs.org/content/conBlogPost/2575>, accessed December 5, 2016.

Instant Poll #1

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How Good Is Your IT Department with Anticipating and Meeting Customer Needs?

- a) YUCK!
- b) MEH
- c) GOOD
- d) AWESOME!



How Good Is Your IT Dept w/ Anticipating and Meeting Needs?

YUCK!

MEH

GOOD

AWESOME!

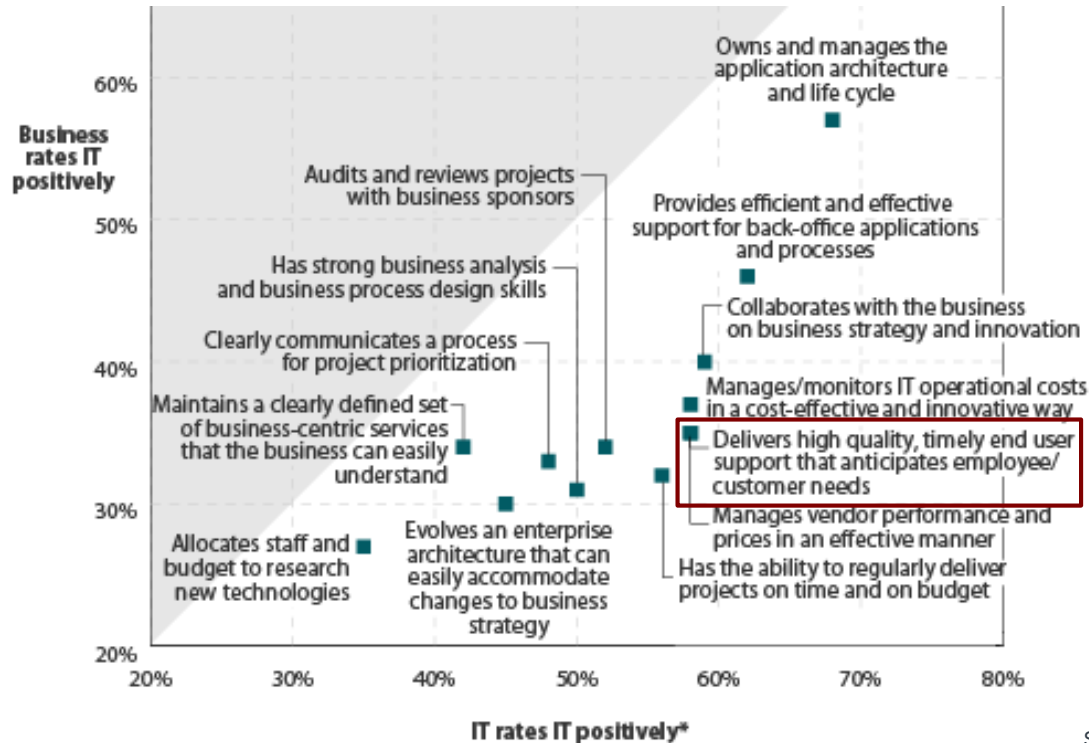
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Where We're Coming From...

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Base: 1,004 North American and European business decision-makers in firms with 1,000+ employees
 *Base: 1,047 North American and European IT budget decision-makers in firms with 1,000+ employees

Source: Forrsights Budgets and Priorities Tracker, Q4 2011;
 Forrsights Business Decision-Makers Survey, Q4 2011

Igniting the Shift to Customer Centricity

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“I want to know my end users better, but I don’t know where to start.”



Talk to your end users



Understand the role of empathy



Measure how your end users think and feel about your IT services



Design customer experiences that matter

Road Map

- 1 Context and Purpose
- 2 **Approaches and Techniques**
- 3 Case Studies and Results

What is Rounding? An Evolution

PAST



Physician



Physicians make “rounds”—visiting patients to assess their conditions and plan care



PRESENT



Physicians



Nurses



Executives



Dept. Leaders



Dept. Staff



- Many different types of rounding have come into practice
- The term has been extended beyond patients to observations and audits involving others such as end-users, customers etc.

Rounding for Outcomes (Studer, 2008)

Proactively engaging, listening to, communicating with, building relationships with, and supporting your most important **customers: clinicians, patients and families, staff, other departments** etc.

What is a Gemba Walk?

gemba noun [U] /'gem.bə/ = “the real place”

Japanese term used in lean manufacturing philosophy to indicate the place where value is created

現場 **Gemba walk** is the practice of going to the place where work is done, observing processes, and collaborating with staff for improvement.

Gemba Basics:



Go See



Ask Why



Show Respect

“When you go out into the workplace, you should be looking for things that you can do for your people there.

...

You’ve got to be looking for changes you can make for the benefit of the people who are working there.”

- Taiichi Ohno



IT Rounding

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Gemba walk to review interaction between **customers, technology, and processes** in real-time.

Key Objectives



Gather real-time insights



Build relationships and connections



Surface improvement opportunities



Create engagement and awareness



Deliver prompt, personalized service



Build credibility for the IT department



All IT staff must round.

How else will we hear from front line users of the systems we implement and support? How else will we hear what really works and what doesn't? **How else can we stay grounded in our users' experience with the systems and tools they need to do their jobs?** How else can we understand what they need from us?"

*Sue Schade, Principal,
StarBridge Advisors*

Anatomy of an Ideal IT Round



Before the Round

1. Identify area and location
2. Establish approach (general vs. focused)
- 3. Review recent tickets for the area**
4. Prepare responses to current issues



During the Round

5. Be 100% present
- 6. Listen with empathy**
7. Show respect and demonstrate expertise
- 8. Communicate service commitment**
9. Manage expectations and timelines



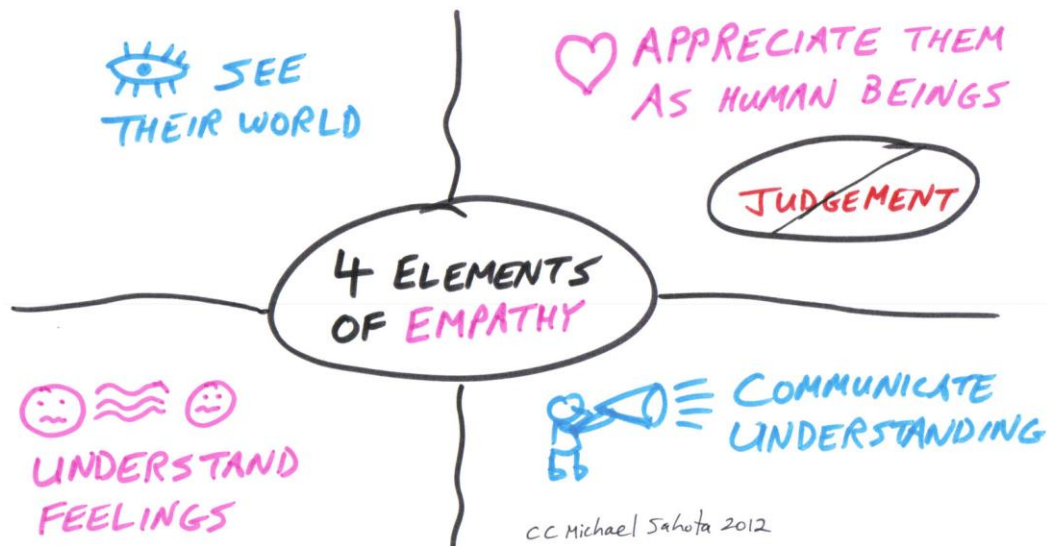
After the Round

10. Send a *thank you* note where needed
- 11. Be responsive with follow through**
12. Follow up to assure gains are sustained

empathy

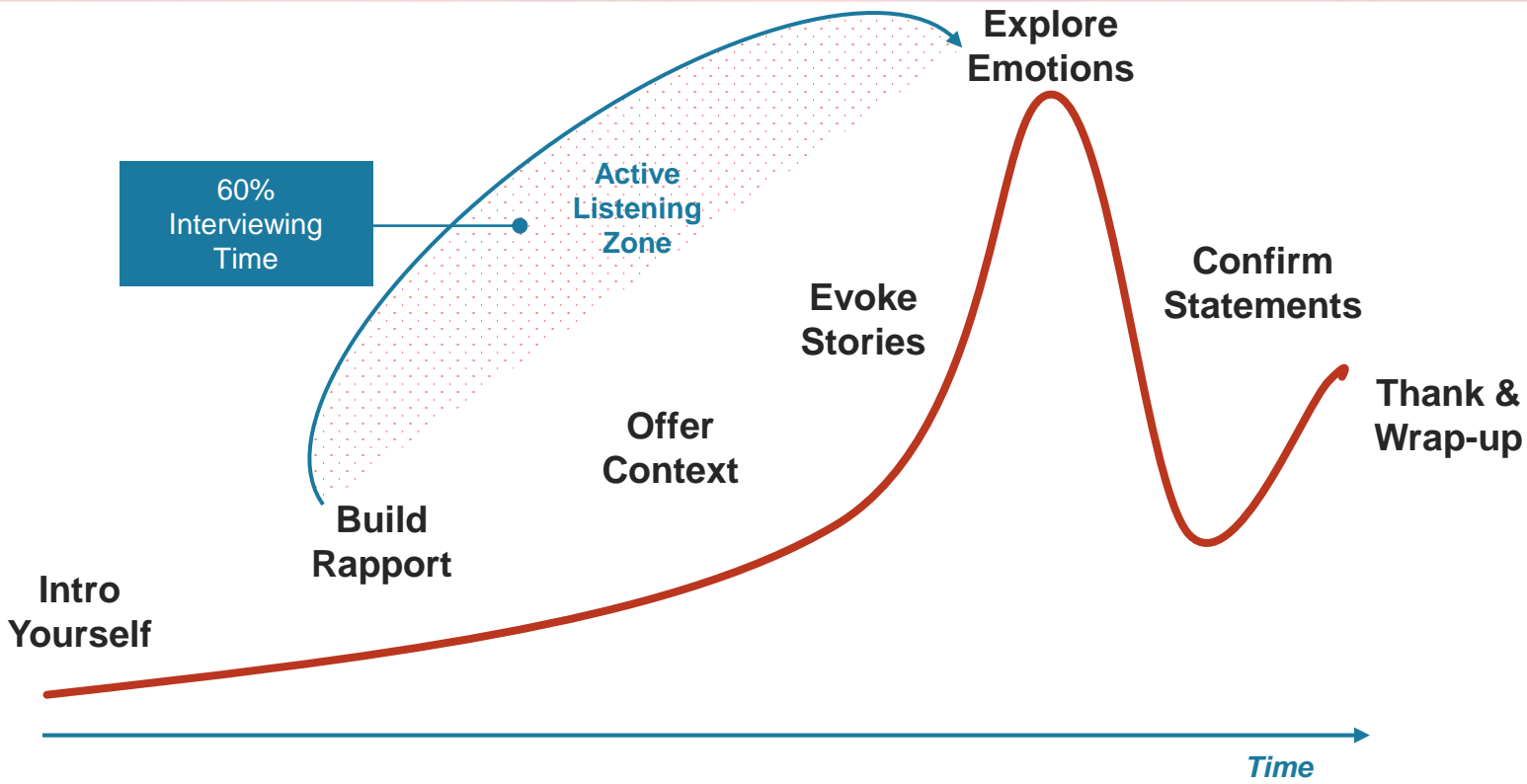
noun | em-pa-thy | \ 'empəTHē\

“the ability to understand and share the feelings of another.”



CLIMB IN THE HOLE.
EMPA & NEVER
SAY
"AT LEAST."
BRENE BROWN
THY

Empathy Interviewing



Anatomy of an Ideal IT Round



Before the Round

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10. Send a *thank you* note where needed
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The Credibility Equation

Credibility = Earn Trust + Add Value



✓ Listen with empathy

✓ Be sincere

✓ Be responsive

✗ Don't make excuses
or pass on blame

✓ Do your research

✓ Demonstrate expertise

✓ Follow through

✗ Don't exaggerate or
overpromise

Setting Up the IT Rounding Program

1 Design the program to address specific goals; secure buy-in and designate resources; **everyone must participate, especially you the leader**

Action Steps

- Define purpose, goals, and structure (approach, frequency and duration, target participation etc.) for the program
- Identify stakeholders, build buy-in for program within IT and with hospital leadership, and communicate initiative
- Designate responsibility for managing training, logistics, and communication between IT and hospital points of contact

2 Equip staff with necessary training and tools; start with active listeners; support participants, but ensure efforts are driven by the teams

Action Steps

- Offer empathy training through new hire orientation and regular classes; encourage practice with videos, role-play, interview scripts etc.; provide tools for demonstrating service commitment and for capturing issues and feedback
- Establish standard for customer service; buddy-up less experienced staff with super users or colleagues where required
- For general rounding, allow participants a choice of location and clinical department according to their interest. Allow individual teams and IT leaders to take initiative for scheduling and facilitating focused rounding.

3 Establish follow-up expectations; **set up clear mechanisms to address action items and to measure participation and impact**



Action Steps

- Follow up immediately on any items that clinicians need help with; establish protocols for coordinating communication within IT and externally with the customer; regularly collect customer feedback and track participation
- Encourage sharing and capturing of rounding stories in daily huddles, department meetings, and via an interactive portal



IT Rounding Script from Stanford Health Care

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Interview Rounding Script

- Connect and Introduce the team:
(Ask: Do you have time to speak with us today? Add response for "no" answer.)
- Communicate the purpose of rounding:
2a. Assure importance of hearing their feedback and confidentiality if desired
- Listen with empathy:
3a. Provide positive feedback during conversation to convey listening
3b. Imagine yourself in their position
3c. When needed: Use "I apologize WE have not met your expectations."
- Summarize & Exit:
(S.T.A.P.L.E.) • [Summarize / Thank / Anything else? / (Pause) / Leave Behind / Exit]
4a. Summarize your understanding and key points from the conversation
-
-
-
-
4b. Summarize follow-up actions to be taken
-
-
-
-
-
5. Follow-up:
5a. Send thank you email, (day of rounding)
5b. Set calendar reminder for 10 days to check-in w/customer
5c. Add self and customer to ServiceNow ticket to receive updates

Key Elements of Training Script

Establishing Connection

Communicating Purpose

Using Empathy

Summarizing with S.T.A.P.L.E Framework

Following Up



IT Rounding Training Script Template from SHC

Please see appendix for the full version of the framework

INC0010927 +

Incident - INC0010927

Submit Resolve Incident

Identification and categorization Investigation and diagnosis Resolution and recovery Closure

Number INC0010927

* Reported by Denise Pitney

* Reported for Buffle Wuestewald

* Business service

Configuration item

* Category Printing

Subcategory Printer malfunction

* Impact 2 - Medium

* Urgency 1 - High

Priority 2 - High

* Short description printer not functioning

Callback number

Location Details

Contact type

Incident state

* Assignment group Field Services - Ricoh Support

Assigned to

Email
Phone
Self-service
Walk-in
Direct Input
Rounding
System Generated
Chat

Stanford's enhanced incident management workflow allows for logging and tracking issues identified during IT Rounds

Customized approach facilitates effective internal IT follow up and external follow through with customers

Incident - INC0014345

Update Save Bomgar Session Key Resolve Incident Delete

Encrypted Description (for PHI/PII)

Description

Notes Related Records Closure Information Record Information

Watch list

Work notes list

ADD PERSON YOU SPOKE TO

Enter email address

Additional comments (Customer visible)

Work notes

***Notes visible to customer

***Notes visible to IT only

Measuring Rounding Impact

Sample Metrics

Goals and current results

Progress in initiatives

Review of accomplishments
and areas requiring attention

Stop light report items and status

Thank you notes received

Employee testimonials

Employee recognition and stories
at department / All-Hands meetings

“As you start getting out there and looking for problems and fixing them before they occur on the backend, you’re going to have fewer calls coming in... **You may not have your tickets going down because you’re finding a lot of things that people just don’t have the time to call for.** But what you’re doing is fixing problems and improving the reputation and the performance of the department.”

*Todd Richardson, CIO,
Deaconess Health System*

How Is IT Measuring Success?

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IT Thinks ...	The Business Thinks ...
Incident Volumes: “Yay we have dealt with 4000 incidents this month”	“Oh, you have failed us 4000 times this month”
First Contact Resolution: “We have achieved a stellar 70% FCR rate in December”	“If you can’t help me, please pass me onto someone who can ... I don’t have 45 minutes for you to try things”
Call Response Time: “We answer 90% of calls within 20 seconds”	“Why does it take me 3 minutes to get through the interactive options before I speak to a human?” (FCR-driven?)
Availability: “We have 99.97% availability on critical services”	“It’s a shame the 0.03% is when we really need it to be working”
Staff training: “100% of our service desk agents are ITIL trained”	“I don’t need to ask them a question on ITIL I need them to help me. Yes, me the customer”

Aiming for Satisfaction

“My **most important KPI is customer satisfaction** [of SAP employees]. Happiness is a competitive advantage; if we have happy employees, they will make our customers happy. This is a direct correlation. We need to put employee productivity at the center of our activities. The **key goal for every IT employee is customer satisfaction** and putting the user at the center. We want to excite them and inspire them.

Thomas Saueressig, CIO, SAP

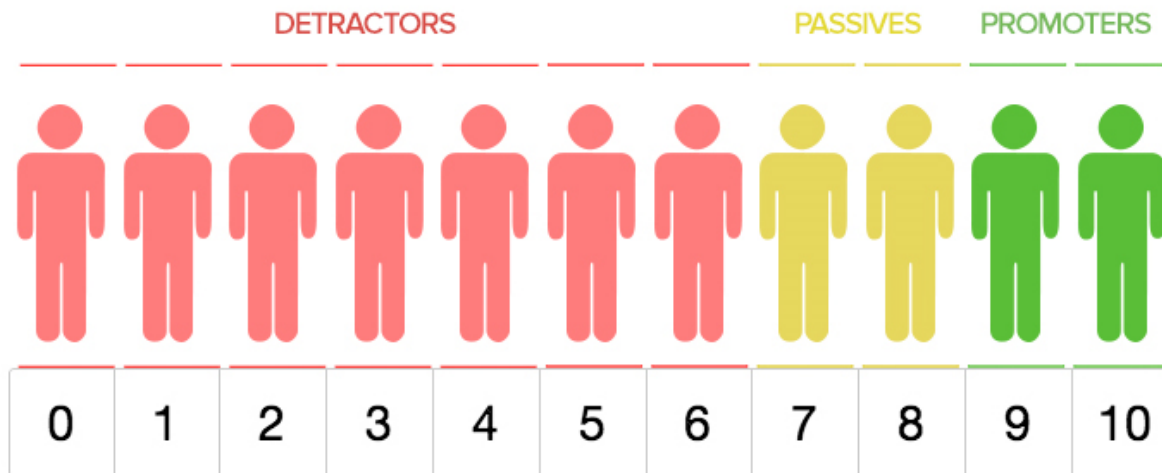
“[I have a] passion to figure out **customer-focused strategies as opposed to, say, competitor-focused strategies**. If you're competitor-focused, you tend to slack off when your benchmarks say that you're the best. But **if your focus is on customers, you keep improving**.

Jeff Bezos, Founder, Chairman, and CEO, Amazon.com

Net Promoter Score

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“IT Consistently Provides Me a Premium Experience”



minus



=

NPS
SCORE



Instant Poll #2

Are You Using a Customer Satisfaction Metric to Measure IT Experience?

- a) Net Promoter Score
- b) C-SAT
- c) Our Own Customer Satisfaction Metric
- d) None



Are You Using Satisfaction Metrics to Measure IT Experience?

Net Promoter Score

C-SAT

Our Own CS Metric

None

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The New Killer Internal Customer Experience Metric?

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Time
to
Smile



An Aspirational Goal: Journey Mapping

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What Does Delivering a Great End User Experience Mean?

The end user journey is the complete **sum of experiences** that end users go through when interacting with IT. Instead of looking at just a part of a transaction or experience, the journey documents the full experience of being a customer.

From Touchpoints to Journeys...

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Seeing the World as Customers Do

Attitudes

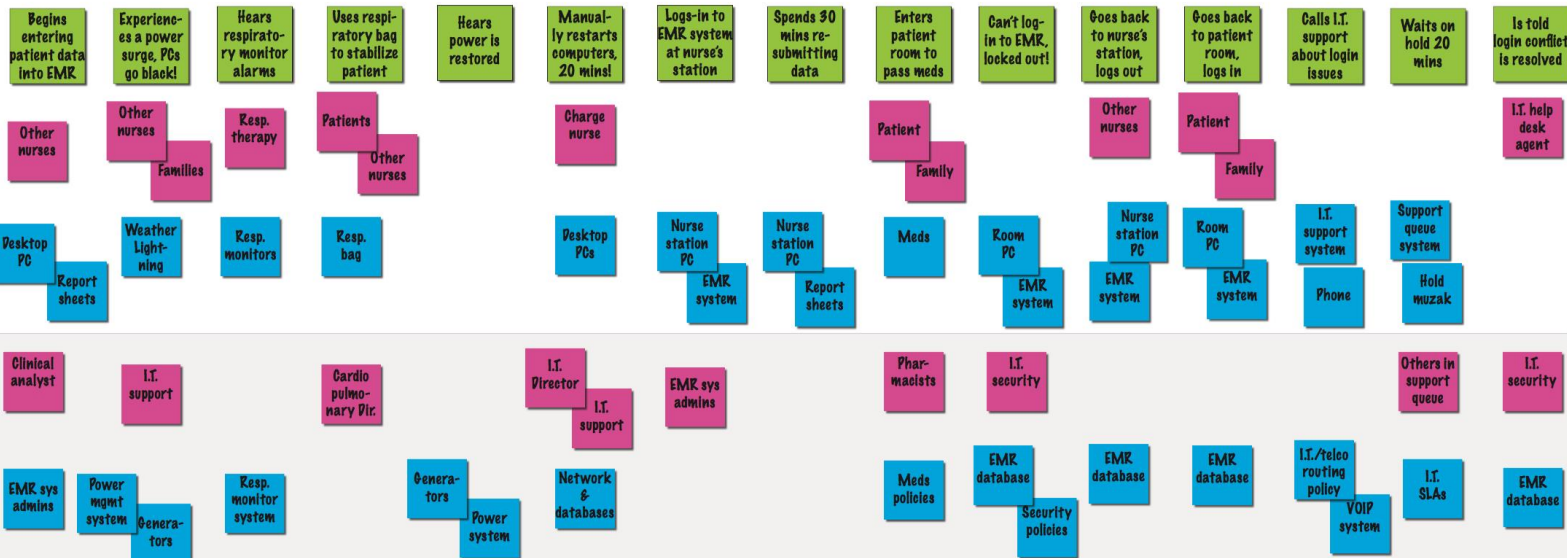
Experience

People

Things

ONSTAGE

BACKSTAGE



Sharon
ICU Nurse



- 20 yrs nursing experience
- Enjoys family interactions
- Likes to stay busy
- Takes pride in providing high quality care
- Seen as a go-to person by many nurses & doctors

Idea

BRAINSTORM

Digging for Stories

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Sharon's Experience



Begins entering patient data into EMR	Experiences a power surge, PCs go black!	Hears respiratory monitor alarms	Uses respiratory bag to stabilize patient	Manually restarts computers; 20mins!	Logs-in to EMR system at nurse's station	Spends 30 mins re-submitting data	Enters patient room to pass meds	Can't log-in to EMR, locked out!	Goes back to nurse's station, logs out	Goes back to patient room, logs in	Calls I.T. support about login issues	Waits on hold 20 mins	Is told login conflict is resolved
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Begin: enterin patient d into EM	Experien a powe surge, P go blac	Hea respira moni alarr	Uses respiratory bag to stabilize patient	Manua restar comput 20min	Logs-in EMR sys at nurs station	Spends mins r submitti data	Enters patient ro to pass m	Can't log to EMR locked o	Goes ba to nurse station logs ou	Goes ba to patie room, logs ir	Calls I supp about lk issue	Wait: hold mir	Is told login conflict is resolved
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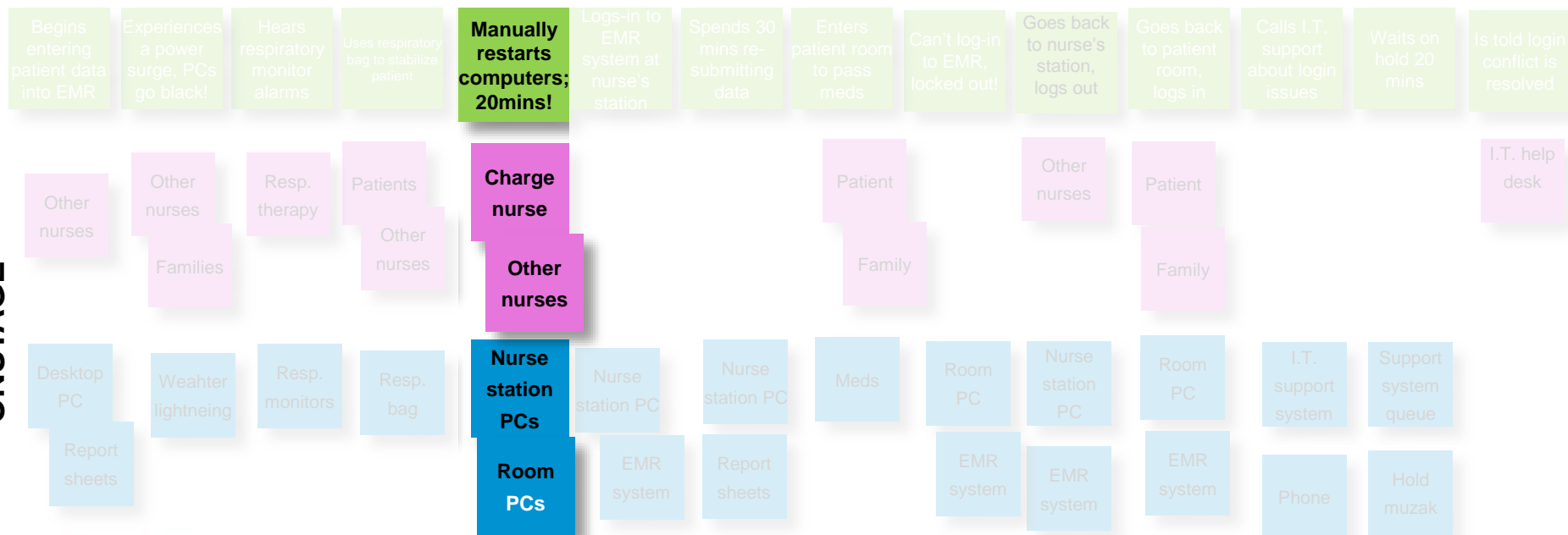
Knowing Processes Surrounding End User

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What and who did Sharon interact with during her experience?

People, processes, technology – “Onstage”

ONSTAGE

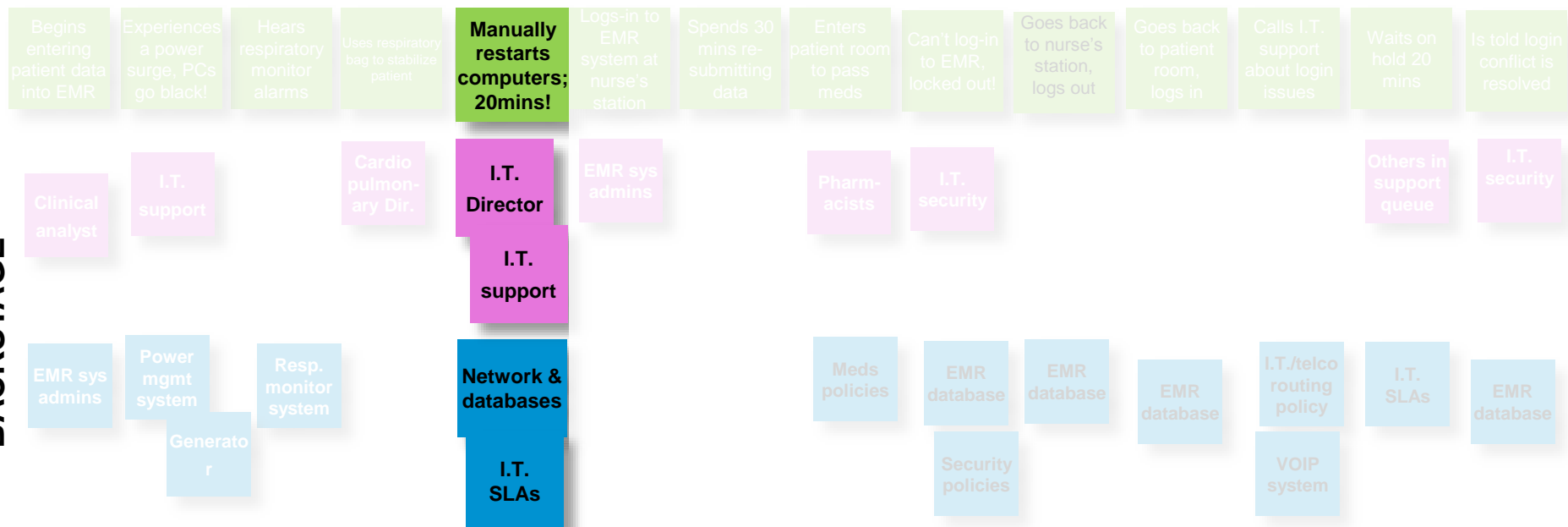


Knowing Processes Surrounding End User

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People, processes, and technologies that Sharon *didn't come into direct contact with*, but that still play a role in her experience – **“Backstage”**

BACKSTAGE



Seeing the World as Customers Do

Attitudes

Experience

People

Things

People

Things

Begins entering patient data into EMR

Experiences a power surge, PCs go black!

Hears respiratory monitor alarms

Uses respiratory bag to stabilize patient

Hears power is restored

Manually restarts computers, 20 mins!

Logs in to EMR system at nurse's station

Spends 30 mins re-submitting data

Enters patient room to pass meds

Can't log in to EMR, locked out!

Goes back to nurse's station, logs out

Goes back to patient room, logs in

Calls I.T. support about login issues

Waits on hold 20 mins

Is told login conflict is resolved

Other nurses

Other nurses

Families

Resp. therapy

Patients

Other nurses

Charge nurse

Patient

Family

Other nurses

Patient

Family

I.T. help desk agent

Desktop PC

Report sheets

Weather Lighting

Resp. monitors

Resp. bag

Desktop PCs

Nurse station PC

EMR system

Nurse station PC

Report sheets

Meds

Room PC

EMR system

Nurse station PC

EMR system

Room PC

EMR system

Clinical analyst

I.T. support

Cardio pulmonary Dir.

I.T. Director

I.T. support

EMR sys admins

Pharmacists

I.T. security

Others in support queue

I.T. security

EMR sys admins

Power mgmt system

Generators

Resp. monitor system

Generators

Power system

Network & databases

Meds polices

EMR database

Security polices

EMR database

EMR database

I.T./teleo routing policy

I.T. SLAs

EMR database

Not Without Challenges!

Top Challenges IT Teams Face When Shifting to Customer-Centric Mindset



Connecting to end users



Busting silos



Changing the perception of IT



Engaging in non-technical, business terms

WANTED: Business-Savvy IT Staff

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“My guys are really smart, but when they press buttons, they forget there are people sitting on the other side of them.”

Anonymous CIO



100%

Gartner's estimate of IT roles that will require an intermediate level of proficiency in business acumen by 2020

Strategies to help IT staff “learn the business”



Encourage staff to interact with users



Let IT staff work in a business area



Have analysts develop relationships with super users



Mentor and provide opportunities to shadow



Send staff to areas of greatest need



Make business education a goal

Source: “How to Develop Business Acumen in the IT Workforce”, Gartner Research, August 2016, available at <http://www.gartner.com/smarterwithgartner/develop-business-acumen-in-the-it-workforce/>; “How to help your IT staff “learn the business””, Tech Pro Research, November 2016, available at <http://www.techproresearch.com/article/how-to-help-your-it-staff-learn-the-business/>; Interviews.

Road Map

- 1 Context and Purpose
- 2 Approaches and Techniques
- 3 **Case Studies and Results**

Instant Poll #3

WHERE THE
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What Is the Primary Purpose of IT Rounding in Your Organization?

- a) Finding and Fixing Issues**
- b) Observing and Learning Workflows**
- c) Improving Engagement and Partnerships**
- d) Gathering Data for Reports / Other**



What Is the Primary Purpose of IT Rounding in Your Org?

Finding & Fixing
Issues

Observing &
Learning...

Engagement &
Partnerships

Gathering Reports
Data / Other

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NewYork–Presbyterian Hospital

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IT Rounding a Cornerstone of Customer Experience Efforts

Key Program Features



Drives Top-Down Innovation

Reintroducing technology to business in a never-seen-before avatar a key IT innovation imperative



Dedicated, Enigmatic CX Executive

Serves as face of IT and owns UX; drives weekly IT Rounds and strives to **convert non-IT colleagues into IT advocates** by engaging in their terms



Employs Empathy

Staff hired for empathy or trained where required; “active listeners” encouraged to lead the IT rounds



Facilitates Bottom-Up Engagement

Keeping pulse on IT adoption and driving continual improvements to support operational goals



Focus on Experience – not Tickets

Staff get Ritz Carlton style training and are coached to represent all of IT; **provide follow up letters with “shopping cart” of issues & “fulfillment dates”**



Captures the Wins

Building on success and popularity to do more: setting up “Tech Stops” and creating mini commercials for apps


“

Ensuring outstanding IT experience is my Job #1. We took bold steps to pivot from an internal-facing team to an external facing team. We started really getting to know the business and spent time with our clinicians to understand how IT can complement care workflows. The result has been greater health care worker productivity and a new, digitally enabled model for patient care. We raised our IT employee engagement scores from **30 percent to 90 percent.**”

*Christine Ooro Singh,
Director of Customer Experience*

“Fulfillment” Approach and Expansion Plans

NYPH’s Follow Up Approach



I.T. Rounding

Who We Are

- NYP I.T. professionals regularly visiting staff and patients on location.
- We serve as “boots on the ground”

What We Promise

- We will commit to solving issues in real-time
- We will deliver technologies that enhance the patient and staff experience

Who We Are

Hello, from the Customer Experience team...

We are thrilled to serve **MH 6HN Unit**, and look forward to building and supporting this relationship.


Thank you for sharing with us the ways we can help make the unit more efficient using IT capabilities. Below is your shopping cart of items we are committed to delivering.

Kind Regards,
Customer Experience Team

Signed: Christine Ooro, 7/20/2016

Shopping Cart

Request	Fulfillment Date
Install MS Word on all desktops	8/5/16
Add audio to all the PCs	8/5/16
Procure PDF converter (two licenses)	8/31/16
Improve Omnicell specimen printing	8/12/16



Key Elements

Introduction and Context

IT Commitment to User Experience

Date and Location of the Round(s)

Executive Signature

List of Requests or Issues

Fulfillment Dates



IT Rounding “Shopping Cart” Letter from NYPH

Please see appendix for the full version of the letter

TechStop by the Numbers

Inaugural TechStop launched in June 2016

1,015
STAFF VISITS

851
REQUESTS
RESOLVED

3,659
PATIENT VISITS

Next TechStop launching in Feb 2017

Stanford Health Care

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Key Features of Stanford's IT Rounding Approach



Articulates central philosophy in a few meaningful words:

"Building loyalty through premium experiences" an IT imperative



Supports central philosophy with core values:

"C-I-CARE" service philosophy applied to internal interactions



Makes core philosophy the focus of orientation:

C-I-CARE and IT Rounding training offered to new hires



Provides customer centric training and support:

Staff equipped and encouraged to perform regular rounds
Training and follow up metrics are captured and measured



Makes it visual:

IT Rounding Cards serve as visual touch points



Reinforces commitment continually:

Rounding stories shared at daily huddles and All-Hands meetings
reinforce mission and inculcate higher sense of purpose



Informatics Education

LeAnna Fries
Director

*I am committed to providing
you with a premium
CICARE ITS experience.*



A little bit about me:

- I lived in The Netherlands for 2 years, earning a graduate degree in Medical Anthropology.
- I strive to inspire through service, kindness, and positivity!
- My team and I are committed to exemplifying the service in IT Services.

I will follow up with you on:

Forgot something?
Call me at 650-736-2622, or
Call our SHC IT Service Desk at 3-3333.



Medical City Healthcare (formerly HCA North Texas)

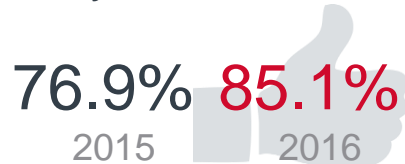
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Case in Brief: “Partner Rounds” Program

- Program launched in response to survey results that surfaced IT related frustrations and pain points from nurses
- IT and nursing leadership deployed proactive rounding in the spirit of hourly rounding and Studer Group leader rounds
- A partner round is an **operational blitz** where IT and nursing staff all round on a unit together for proactive problem solving

Physician Satisfaction



IT Work Order Requests (Per Month)



Time Savings



Reduced high priority issues by 82.5% = 2,584 fewer patient impeding issues a month

Employee Engagement

IT Engagement Ratio



% RN Engagement



We took some of the Studer Group Nurse Leaders Rounding principles and we created Partner Rounding.”

Leah Miller, Chief Information Officer



We (as in nursing) have struggled with IT in the past, and for the first time I can see and feel the difference it makes partnering with IT. When people can understand and relate to one another in their own environments, it makes all the difference in the world.”

*Cassidi Roberts, Chief Nursing Officer
Medical Center of McKinney*



Our patients are safer, nurses are happier, efficiency has improved and both disciplines have a greater understanding of the importance of their contributions.”

Carol Gregory, Chief Nursing Executive

Source: Miller, L. (2016, November 21). Telephone interview; Gregory, C. (2016). “Interprofessional Collaboration Creates IT Rounding.” Advance for Nurses. July 2016, 23-24. Miller, L., & Gregory, C. (2016, August). “Patients are at the Heart of IT&S and Nursing” Medical City Healthcare. Poster session presented at the Studer What’s Right in Health Care Conference, Chicago, IL.

Establishing Visibility and Follow Up

WHERE THE
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IN HEALTH AND IT INSPIRE ACTION



Partner Focus

"Taking care of our nurses so they can take care of our patients"

On *<date>*, the *<hospital name>* IT&S department conducted a Partner Focus visit on the *<unit name and location>*. The focus of the visit was to meet with the clinical staff discovering ways to help, while proactively resolving many IT-related issues. During our visit we learned about some of the technology struggles, replaced old equipment, cleaned monitors and medication carts, installed necessary software, or provided training to a member of the clinical team. It is our goal to provide the best equipment and service to the clinical teams, which will help to:

- **Reduce frustration levels when IT equipment fails to perform**
- **Increase clinician productivity**
- **Increase employee satisfaction**
- **Reduce calls to the Service Desk**
- **Let the clinical team focus on treating patients' first**

Thank you for the opportunity to partner with you in providing the best possible care to our patients.

Key Elements of Follow Up Report

Details of the Partner Focus visit

Purpose and Goals of the visit

IT Commitment and Gratitude

Results of the Visit



IT Rounding Sample Follow Up Report

Please see appendix for the full version of the letter



Stanford Children's Health

WHERE THE
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Actively Bridging the Divide with Service Liaison Led IT Rounding



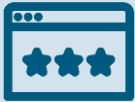
Approach in Brief: IT Rounding by Service Leaders

- IT Rounding program designed to establish relationships and to “hunt for problems”
- Service Leaders assigned to key clinical areas in the hospital (Clinical Informatics Managers serve in Service Leader role for Nursing Units)
- Serve as single point of IT accountability for the area being represented and round at least 2x/week (Gemba rounds) in the unit/department
- Findings reported out to IT leaders on a weekly basis and manage accountability

Mission Accomplished, and Then Some

WHERE THE
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Anticipated Benefits



Improved customer satisfaction



Right-sized demand for IT services



Eliminated surprises

Unexpected Gains



Demystified IT's role to business leaders



Drove more efficient use of IT



Improved technology deployment time

himss Analytics ^{STAGE} 7



Value for IT and Operations

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“I get to learn the business and find ways to help improve business processes utilizing IT solutions.”

Pharmacy Service Leader

“I don't think it would be possible for us to meet our mission without our Service Leader. He is integrated in our strategic discussions and decisions as we are very dependent on our IT resources.”

Director of Pharmacy

“Wearing my **IS hat**, I have the opportunity to do what I love with systems management, support and education. Wearing my, **radiology hat** I can remain closely connected to the patient care providers and continue to be a real part of patient care by supporting them & the applications they use on a daily basis.”

Radiology Service Leader

Texas Health Resources

WHERE THE
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Cultivating Compassion and Boosting Engagement through “Connections”



Case in Brief: “Connections” Program

- Aims to connect “head to the heart” through shadowing opportunities and IT rounds
- **Focus is on “observing and learning” workflows rather than on “finding and fixing”**
- Accommodates employee choice and includes both clinical and non-clinical areas (for ex: clinical staff in IT get to round on data center)
- Employees participate monthly and submit online report within the week on their experience
- Project manager develops schedule and coordinates registration and site visits



10 Step Guide for Setting up Connections

Please see appendix for a simple How To guide from THR on setting up the Connections program

Clinician Engagement



“The clinicians who were shadowed learned more about technology. They learned IT cares and that they have an incredible support structure surrounding them.”

Relationships and Credibility



“Respect from operational leaders increased because they saw that IT cared enough to take such action. Relationships were cultivated, creating a family-oriented culture.”

Business Outcomes



“While not scientifically validated, there appeared to be an overall correlation between organizational outcomes and Connections.”

Employee Engagement



“As Connections formed, employee sense of purpose, satisfaction of accomplishment, and commitment to community increased. IT employee engagement rose, creating and nurturing new talents.”

HIMSS17

Source: Marx, E. (2016, November 22). Telephone interview. The Advisory Board Company; “CIO Unplugged 8/17/11”, *HIStalk*, August 2011, available at <http://histalk2.com/2011/08/17/cio-unplugged-81711/>, accessed December 5, 2016.



Employee Transformation Testimonies

“I have worked here for 20 years and for the first time I realized we have patients.” *(Programmer)*

“I never saw myself as part of the patient care process until now.” *(Field Support)*

“Patient care was the core focus of every area. It was really great to see the patients and what we really work for. Rounding reminds us of what is truly important and why we do what we do” *(Security Analyst)*

“This is my second Rounding, and every time I get a much more vivid idea of how my contributions and duties make a difference and reaffirms the promise to our community and the people we serve.” *(Data Center Operator)*

“I run marathons. I was more exhausted shadowing a nurse today. I never knew.” *(Project Manager)*

“Given what I saw I can't begin to imagine how stressful their work must be. We need to do everything we possibly can to make it less so.” *(Vice President)*

STEPS: Satisfaction

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Increasing

- Clinician satisfaction / NPS scores
- Responsiveness / first-call resolution rate
- Service quality
- IT employee engagement

Decreasing

- Frustration levels during IT failures
- Confusion about IT upgrades and updates
- Employee attrition rates

STEP S: Savings

WHERE THE
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IN HEALTH AND IT INSPIRE ACTION

Increasing

- Clinician productivity
- Time and FTE savings from reduced patient impeding issues
- Savings from more efficient technology use

Decreasing

- Year-over-year customer service costs
- Complaint costs
- Overtime costs
- Calls to the service desk

Instant Poll #4

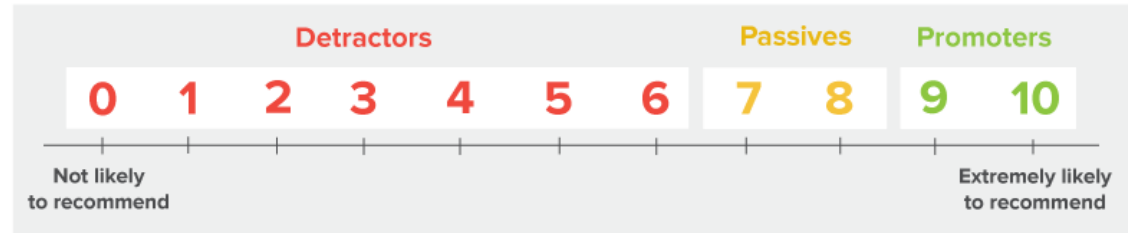
WHERE THE
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How Likely Are You to Recommend This Session to a Colleague?

1) 0 – 6

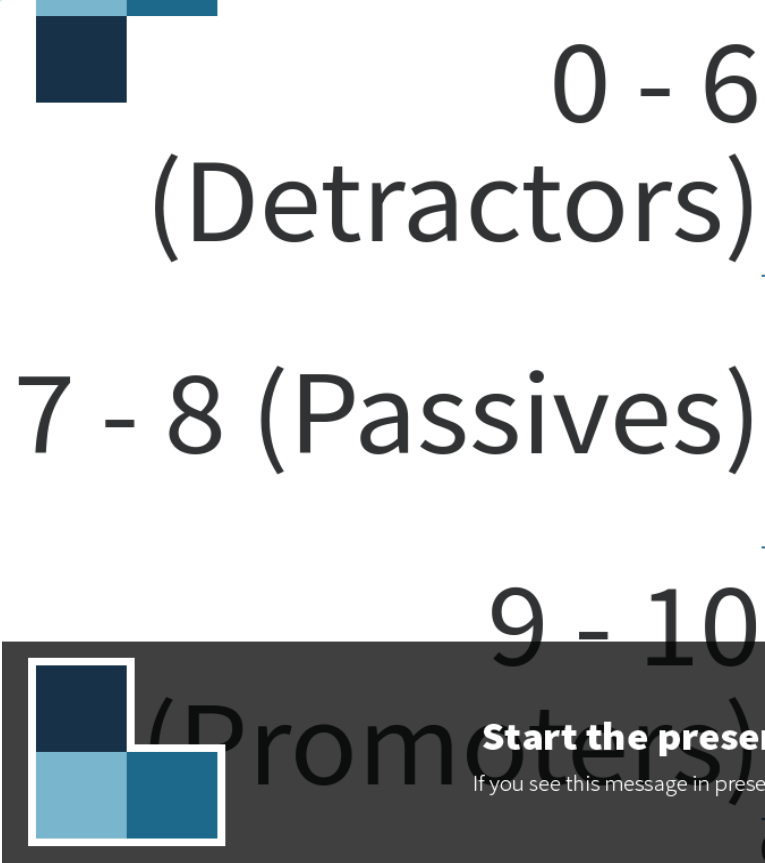
2) 7 – 8

3) 9 – 10



$$\text{NPS} = \% \text{ 😊 } - \% \text{ ☹️ }$$

How Likely Are You to Recommend This Session to a Colleague?



Start the presentation to activate live content

If you see this message in presentation mode, install the add-in or get help at PollEv.com/app

Q&A and Contact Information

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Lisa Grism, RN MSN
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santosh.mohan@fuqua.duke.edu

Let the rounding begin!



On *<date>*, the *<hospital name>* IT&S department conducted a Partner Focus visit on the *<unit name and location>*. The focus of the visit was to meet with the clinical staff discovering ways to help, while proactively resolving many IT-related issues. During our visit we learned about some of the technology struggles, replaced old equipment, cleaned monitors and medication carts, installed necessary software, or provided training to a member of the clinical team. It is our goal to provide the best equipment and service to the clinical teams, which will help to:

- Reduce frustration levels when IT equipment fails to perform
- Increase clinician productivity
- Increase employee satisfaction
- Reduce calls to the Service Desk
- Let the clinical team focus on treating patients' first

Thank you for the opportunity to partner with you in providing the best possible care to our patients.

Results of the Visit:

Item	#	Comments
PCs evaluated		
Keyboards Replaced		
Mice Replaced		
Tap-N-Go Readers/Badge Enrollment		
SSO Software Deployed		
Monitors Replaced		
Mouse Pads Replaced		
Printers/MedComm (mapped, labeled, cleaned)		
cTracker		
Kronos Time Clocks		
Scanners		
Phone Cords Replaced		
Clinicians Trained on Systems		
Physicians Trained on Systems		
Cable Management/PC Labeling		
Patient Rooms PCs cleaned		
Validate Neuron Functionality		
Carts Cleaned		

Action Items:

Follow-up Item	Person Responsible	Due Date
<i>Item #1</i>		
<i>Item #2</i>		
<i>Item #3</i>		

If something was overlooked during the visit, please let me know so we can get it taken care of as quickly as possible.

Director IT&S

Appendix 1:

IT Rounding Report Template from Medical City Healthcare

Appendix 2:

Sample IT Rounding “Shopping Cart” Letter from NYPH



I.T. Rounding

<p>Who We Are</p> <ul style="list-style-type: none"> • NYP I.T. professionals regularly visiting staff and patients on location. • We serve as “boots on the ground” 	<p>Hello, from the Customer Experience team...</p> <p>We are thrilled to serve MH 6HN Unit, and look forward to building and supporting this relationship.</p> <p>Thank you for sharing with us the ways we can help make the unit more efficient using IT capabilities. Below is your shopping cart of items we are committed to delivering.</p> <p>Kind Regards, Customer Experience Team</p> <p>Signed: Christine Ooro, 7/20/2016</p>
---	---


Shopping Cart

Request	Fulfillment Date
Install MS Word on all desktops	8/5/16
Add audio to all the PCs	8/5/16
Procure PDF converter (two licenses)	8/31/16
Improve Omnicell specimen printing	8/12/16


<p>What We Promise</p> <ul style="list-style-type: none"> • We will commit to solving issues in real-time • We will deliver technologies that enhance the patient and staff experience <p>NYP TechStop</p>
--

Appendix 3:

IT Rounding Script Template from Stanford Health Care



ITS Academy



Stanford
HEALTH CARE

Interview Rounding Script

1. Connect and Introduce the team:
(Ask: Do you have time to speak with us today? Add response for "no" answer.)
2. Communicate the purpose of rounding:
2a. Assure importance of hearing their feedback and confidentiality if desired
3. Listen with empathy:
3a. Provide positive feedback during conversation to convey listening
3b. Imagine yourself in their position
3c. When needed: Use "I apologize WE have not met your expectations."
4. Summarize & Exit:
(S.T.A.P.L.E.) - [Summarize / Thank / Anything else? / (Pause) / Leave Behind / Exit]
4a. Summarize your understanding and key points from the conversation
.
.
.
.
4b. Summarize follow-up actions to be taken
.
.
.
.
5. Follow-up:
5a. Send thank you email, (day of rounding)
5b. Set calendar reminder for 10 days to check-in w/customer
5c. Add self and customer to ServiceNow ticket to receive updates

Appendix 4:

10 Step Guide from THR for Setting Up “Connections”

- Everyone must participate, especially you the leader
- Speak with your hospital leadership and identify points of contact
- Decide on a tool to use for registration and documents
- Develop a schedule and begin registration into clinical areas
- Allow employees a choice according to their interest such as ED, OR, Lab, Nursing, Pharmacy, etc.
- Spend a minimum of 4 hours shadowing
- Set up an interactive site to have employees post feedback on their experience
- Follow up immediately on any items clinicians need help with
- Send thank you notes to all clinicians involved
- Repeat

Appendix 4 Contd: How-To Guide from THR on Customer Relationship Management

1. Identify all critical relationships
2. Assign team members to visit each person quarterly
3. Priorities:
 1. Develop relationships
 2. Understand strategies
 3. High touch customer service
4. Use a tool to gather and communicate results of meetings
5. Follow-up immediately on action items
6. Repeat

Appendix 5:

More Employee Transformation Testimonies from THR

- *"I must admit, I hated this idea but did it because I had to. I have worked here for 20 years and for the first time I realized we have patients. Of course I knew what we did as a hospital but really, this was incredibly impacting and I will never be the same."* (Programmer)
- *"I am not the same today as yesterday."* (Network Engineer)
- *"I volunteered to observe in the OB unit. With clinician and patient consent, I witnessed the birth of twin babies. I never realized all the behind the scenes coordination required and it opened my eyes to a whole new world."* (Admin Assistant)
- *"My life is changed. I always wanted to be care giver but didn't like blood so chose a different path in technology. Now I tell people I am both."* (Application Analyst)
- *"In one day I witnessed the joy of healing and the pain of death. I now see how critical IT is and why we need to be the best that we can be to support the front lines."* (Business Analyst)
- *"I am a nurse and did not see why I had to take part in Connections. After today, it was like I was hit by a ton of bricks! Wake up call! Thank you, thank you, thank you."* (Application Analyst)
- *"The experience is another reminder that the bigger picture of our health system, being a body of entities, departments and individuals, come together for the patients to have one more beat of life."* (Data Center Operator)
- *"The experience was one that I am very thankful to have participated in and I can't wait to do it all over again."* (Application Manager)
- *"There is a lot of new technology on the floor and it's cool to see how all the parts fit together to make the whole. People working with people and technology involved to make health care better."* (Business Analyst)
- *"Clinicians are the reason we all have jobs, and I thank them for all of their hard work."* (Business Applications Manager)
- *"It was very educational for me to see what the nurses and physicians do and how they use technology in their environment. It's always a good thing for people working in technology to understand the business they support. Glad I had the opportunity."* (Data Center Manager)
- *"I have worked at 4 different health care organizations in 3 different states and this is the first time I have seen a program like this. I am proud to work here."* (Application Analyst)