

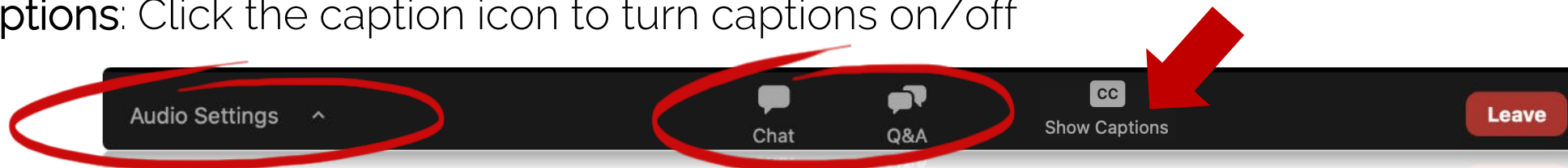
Signals to Action: Northwestern Medicine's Journey to Humanizing Healthcare Experiences

December 19, 2023



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- All participants are muted.
- **Audio Settings:** ability to select your speakers and adjust your volume.
- **Chat:** for sharing of ideas, interacting with speakers and attendees; not for promoting services and products. Make sure you choose 'Everyone' in the dropdown in the chat box.
- **Q&A:** for submitting questions to review at the end of the webinar
- **Captions:** Click the caption icon to turn captions on/off



- Receive follow up email tomorrow with webinar slides, recording and link to survey.

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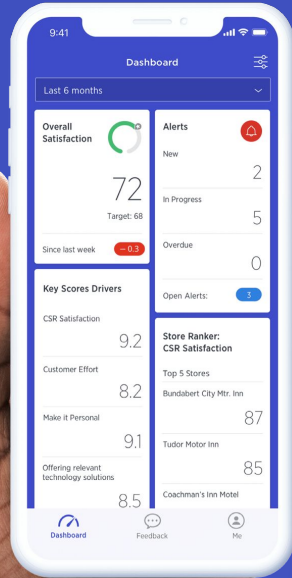
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**Signals to Action:
Northwestern Medicine's
Journey to Humanizing
Healthcare Experiences**





INTRODUCING

Medallia

OUR ORIGIN STORY

Turning Insights into Action

LEADING THE INDUSTRY

The
2000s

Engaging Every Employee

Personalized Role-based reporting at every level, Learning Workflows, Link between Customer and Employee Experiences

The
2010s

Action-Oriented Intelligence

Text Analytics and Unstructured Data Workflows
Journeys: Top-down, Bottom-up, Profiles

The
2020s

Moving Beyond the Vocal Minority

Striving for 100% of interactions: Social, Video, Speech, Digital Behavior, Ideas, RTIM, Journey Orchestration

ONLY MEDALLIA

64%

Of our programs have
100+ users

60%

Of programs touch
Employee Experience

1.6B

Unstructured signals
analyzed in 2021

86%

Of programs span more
than one department

80%

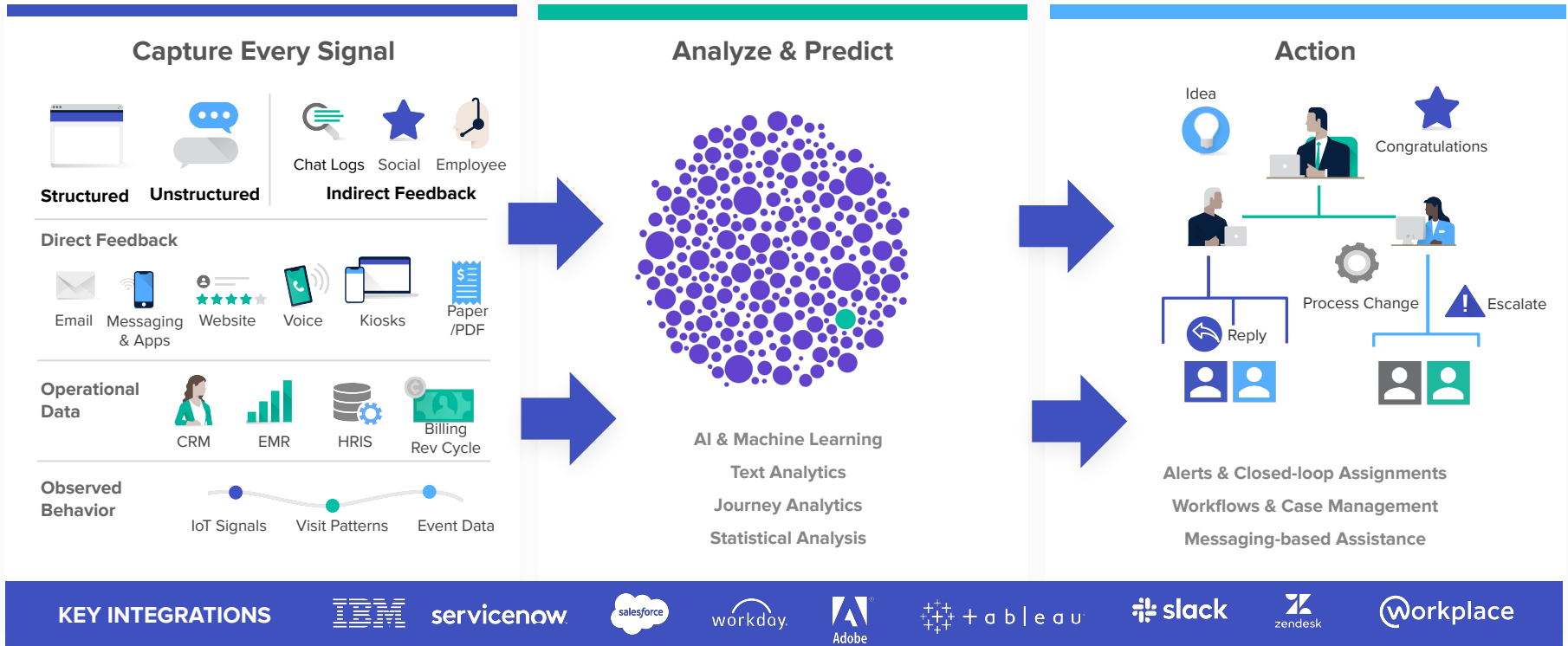
Of signals analyzed are
non-survey data

4.6B

Automated actions
this year

What we do and how we do it

Accelerating impact from **signals to action**





Current Healthcare Landscape

Americans trust the health care system less now than in the past.



“Patients” to “Consumer” + “Human” Experiences

Signals:

Personalized +
Across the
Care Journey

Action:

Modernized
Methods +
Improvement-
Focused



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.



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12 straight years**

U.S. News & World Report Honor Roll

Aa2 / AA+

Credit Rating over 20
years

**#1 Private Provider Charity
Care**

Chicago & IL

**#1 NIH Funded Medical
School Chicago & IL**

1 Million

Patients from USA + 80
Countries

Executive Summary

NM needed a **more contemporary approach** to gather feedback – a Short, Modern, Smart survey

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**.

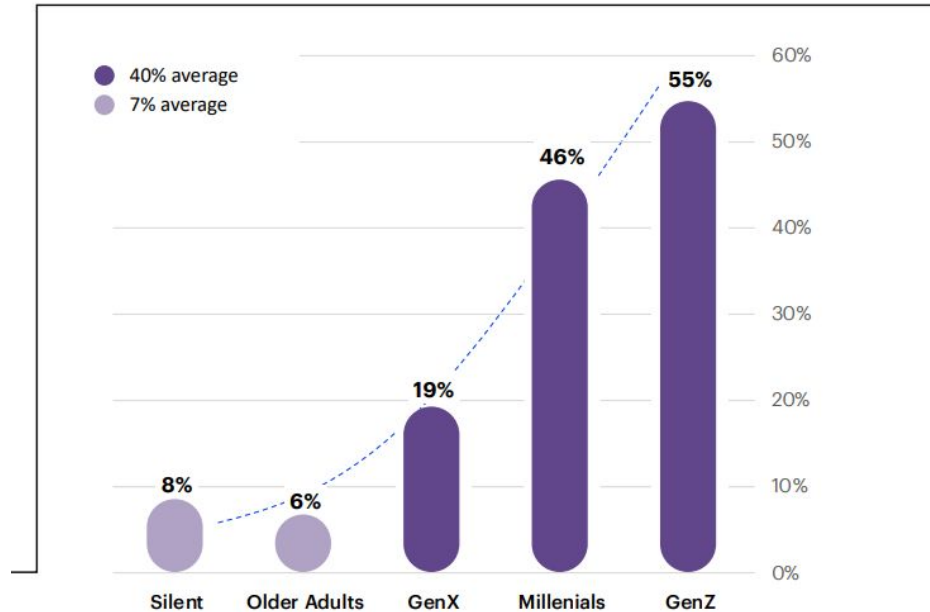
As of July 2021, **NM has fully transitioned** to a new experience survey platform and continues to innovate.

Why does Experience Matter to NM?

- Patient First Mission
- Improved clinical outcomes
- Flight Risk
- Potential higher profit margins

Figure 2

Younger generations are nearly six times more likely to switch providers than older people are.



Source: 2022 Accenture Patient Experience Benchmark Survey

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Vendor Challenges: Previous State Engagement Program

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 self-directed survey experience through the use of branching questions

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)

Rapidly customize surveys to align with organizational needs

Multi-Year Approach

An incremental approach to the survey transition process

Phase 1:	Phase 2:	Phase 3:	Phase 4:	Phase 5 and Beyond:
FY19	FY20	FY21/22	FY22/23	FY24
Planning and Vendor Selection	Implementation Kick-Off	System-Wide Transition	Continue Innovation	Continue Innovation
<ul style="list-style-type: none"> Project Charter Development Internal and External Research Selection of new vendor 	<ul style="list-style-type: none"> Ambulatory and ICC Clinic Survey Launch Employee and Physician Survey Launch March 2019 	<ul style="list-style-type: none"> Hospital-Based Services Survey Launch CMS and Magnet Certification Compliance 	<ul style="list-style-type: none"> Nurse Leader Rounding New Hire Onboarding Exit Interview Contact Center Continue to Implement Across New Integrations 	<ul style="list-style-type: none"> Patient Profiles Journey mapping across survey channels

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 Likely To Recommend- LTR score)
- Improve timeliness of survey invites (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)

Patient Survey: Current State

All service lines were surveying with the new survey vendor by July 2021. NM is now surveying across 11 hospitals and numerous medical group locations (500+ scheduling clinics)

	Previous State	Current State
Number of Questions	26+ Questions	3 Questions with Branching Logic leading to 9 Magnet/Driver Questions
Measurement	5-point LTR Percentile Rank	10-point LTR Net Promoter Score
Mode	Email, Paper	Text, Email
Timeliness of Invitation	3-7 days post visit	4 hours post visit or upon checkout
Timeliness of Feedback	~1 week delay	Responses available in real time



New survey averages
less than 4 minutes



>50% response rate
increase




>74% of surveys
contain comments

A warm, cozy scene featuring a fireplace with a bright fire in the background. In the foreground, two white mugs sit on a wooden surface next to a light-colored, textured blanket. The entire scene is overlaid with a semi-transparent blue rounded rectangle containing text.

Who were the key stakeholders/influencers involved with the decision to modernize the NM feedback program (both on PX and EX)?

A warm, cozy scene featuring a fireplace with a bright fire burning. In the foreground, two white mugs sit on a wooden surface, and a white, textured blanket is draped over the side of the fireplace. The overall atmosphere is warm and inviting.

Which roles did the team engage during the survey streamlining process (both on PX and EX)?



Were there any pivotal change management techniques that you would recommend to others embarking on a similar journey?



How did you anticipate/manage resistance?



Connecting Experience

Unified Measurement + Reporting

Patient NPS

- LTR [Location] for care.
- LTR [Provider] for care.



Please tell us the reasons for your score.

Employee NPS

- LTR NM as a Place to Work
- LTR [Dept] as a Place to Work



Please tell us the reasons for your score.

Physician NPS

- LTR NM as a Place to Practice
- LTR [Dept] as a Place to Practice



Please tell us the reasons for your score.

Leveraging Unstructured Feedback

TA Overview

- **30** Level 1 topics
- **159** Level 2 topics

With every new survey:

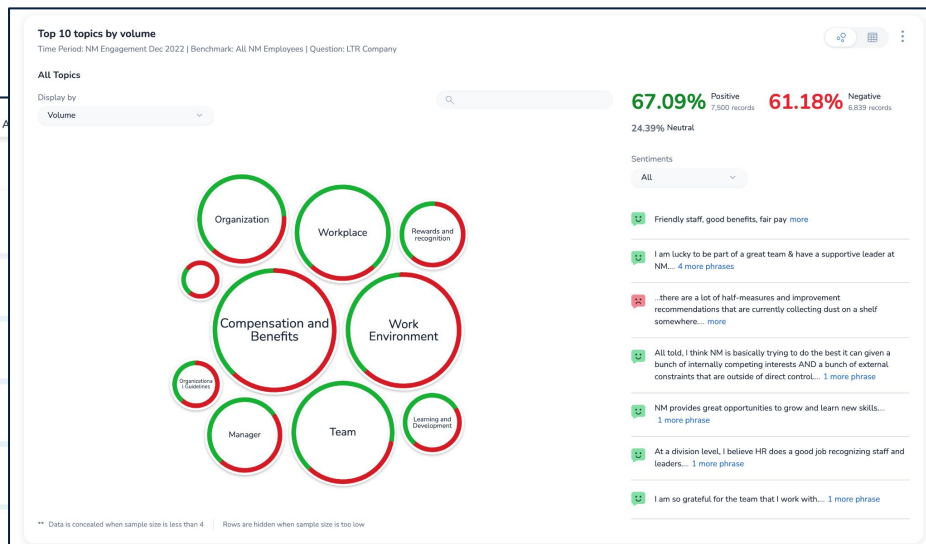
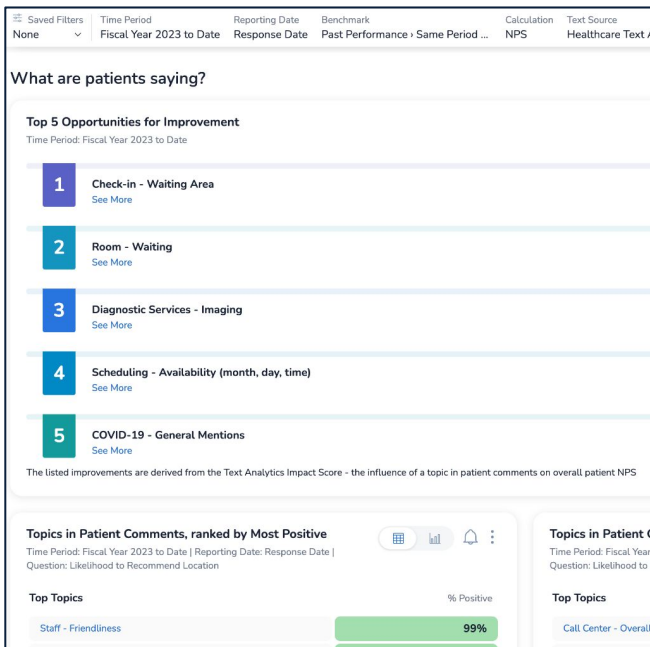
- Analyze historical data and build custom topics prior to launch

Topics Snapshot
Time Period: Fiscal Year 2023 to Date | Question: Likelihood to Recommend Location

Topic	NPS	Impact Score	% of Responses	Net Sentiment	% Positive	% Negative
> Gratitude	91.6	0.0	0.6% (2,899)	93.8	94.8% (2,748)	1.0% (30)
> Staff	90.6	+1.0	16.0% (73,635)	94.9	97.1% (71,495)	2.2% (1,590)
Employee Recognition	90.0	+0.2	4.4% (20,172)	87.5	90.6% (18,266)	3.1% (624)
> Communication	88.4	+0.8	20.7% (95,292)	90.6	94.9% (90,443)	4.3% (4,115)
> Doctor/Provider	88.1	+0.6	19.0% (87,261)	92.9	96.0% (83,759)	3.1% (2,681)
> Teamwork	85.4	0.0	0.7% (3,275)	84.1	90.6% (2,968)	6.5% (213)
> Facility	77.6	-0.3	3.4% (15,526)	70.1	82.3% (12,772)	12.1% (1,881)
> Nurse	77.0	-0.2	2.8% (12,680)	86.6	92.4% (11,714)	5.8% (737)
> Clinical Care	76.5	-0.4	3.9% (17,837)	66.1	79.2% (14,120)	13.0% (2,321)
> Room	67.4	-0.5	2.8% (12,794)	58.8	75.9% (9,714)	17.1% (2,192)
> Trust / Loyalty	64.7	-0.2	0.8% (3,718)	56.5	71.2% (2,646)	14.6% (544)
> Follow-up	59.2	-0.4	1.4% (6,240)	41.6	62.3% (3,886)	20.7% (1,293)
> New Patient	59.1	0.0	0.1% (230)	23.5	53.0% (122)	29.6% (68)
> Scheduling	59.0	-0.4	1.6% (7,444)	29.5	60.2% (4,485)	30.7% (2,288)
> Check-in	58.4	-0.5	2.0% (9,098)	47.2	70.5% (6,413)	23.3% (2,122)
> MyChart Patient Portal	55.2	-0.1	0.3% (1,252)	31.5	58.1% (728)	26.6% (333)
> TeleHealth	54.5	-0.1	0.3% (1,602)	7.7	46.1% (739)	38.4% (615)
> Personal Needs	53.8	-0.1	0.4% (1,794)	-21.1	31.3% (561)	52.4% (940)
> Diagnostic Services	50.9	-0.4	1.1% (5,156)	38.4	62.7% (3,233)	24.3% (1,252)

TA Modules throughout the dashboards

TA Reporting is always included on main dashboards for *both employee & patient* reporting



Employee Recognition Topic

Used portal to communicate with Dr. [redacted]

Dr. [redacted] is thorough, knowledgeable, kind, and courteous.

Dr. [redacted] is great.

Dr. [redacted] was very quick to respond and address my concerns, as usual!

Excellent staff and support. Dr. [redacted] is wonderful always kind, interested in the problems presented to her, knowledgeable and I feel a great sense of trust with her.

Dr. [redacted] is very attentive and thorough professional. My confidence in him continues to be high.

I really appreciate the professional, courteous staff - from the front desk receptionists, [redacted] to the check out desk it's an all around pleasant experience. Thank you.

Dr. [redacted] is a great doctor. He's attentive and kind and thoughtfully responds to any concerns and questions.

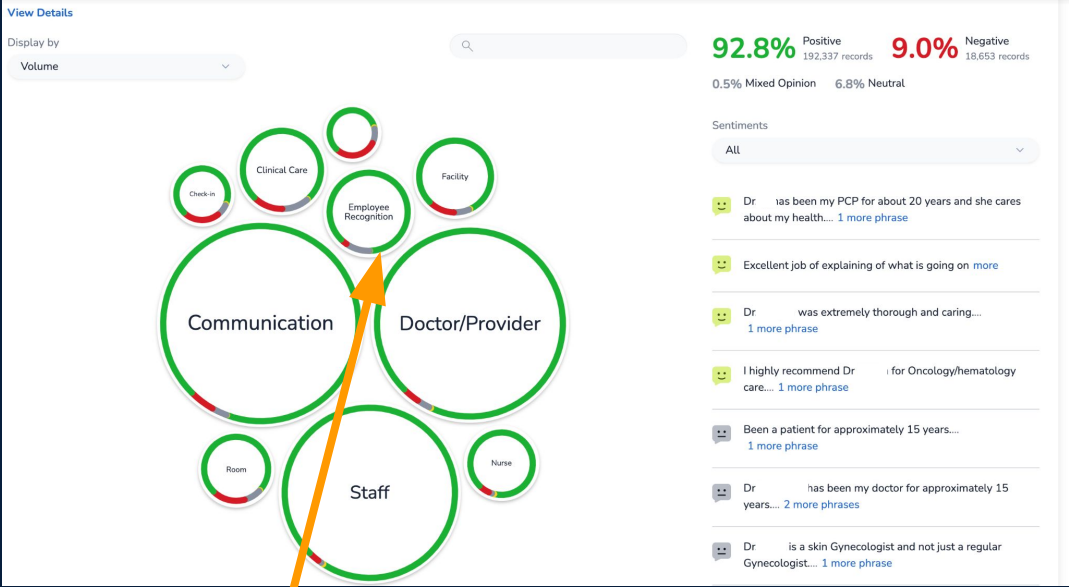
Dr. [redacted] helps so much with the my medical process

Dr. [redacted] is singularly responsible for saving my life. He is a brilliant diagnostician and confers a sense of hope, optimism, and sincere concern. Dr. [redacted] is the gold standard of physicians.

No concerns. Only praise for Dr. [redacted] and [redacted]

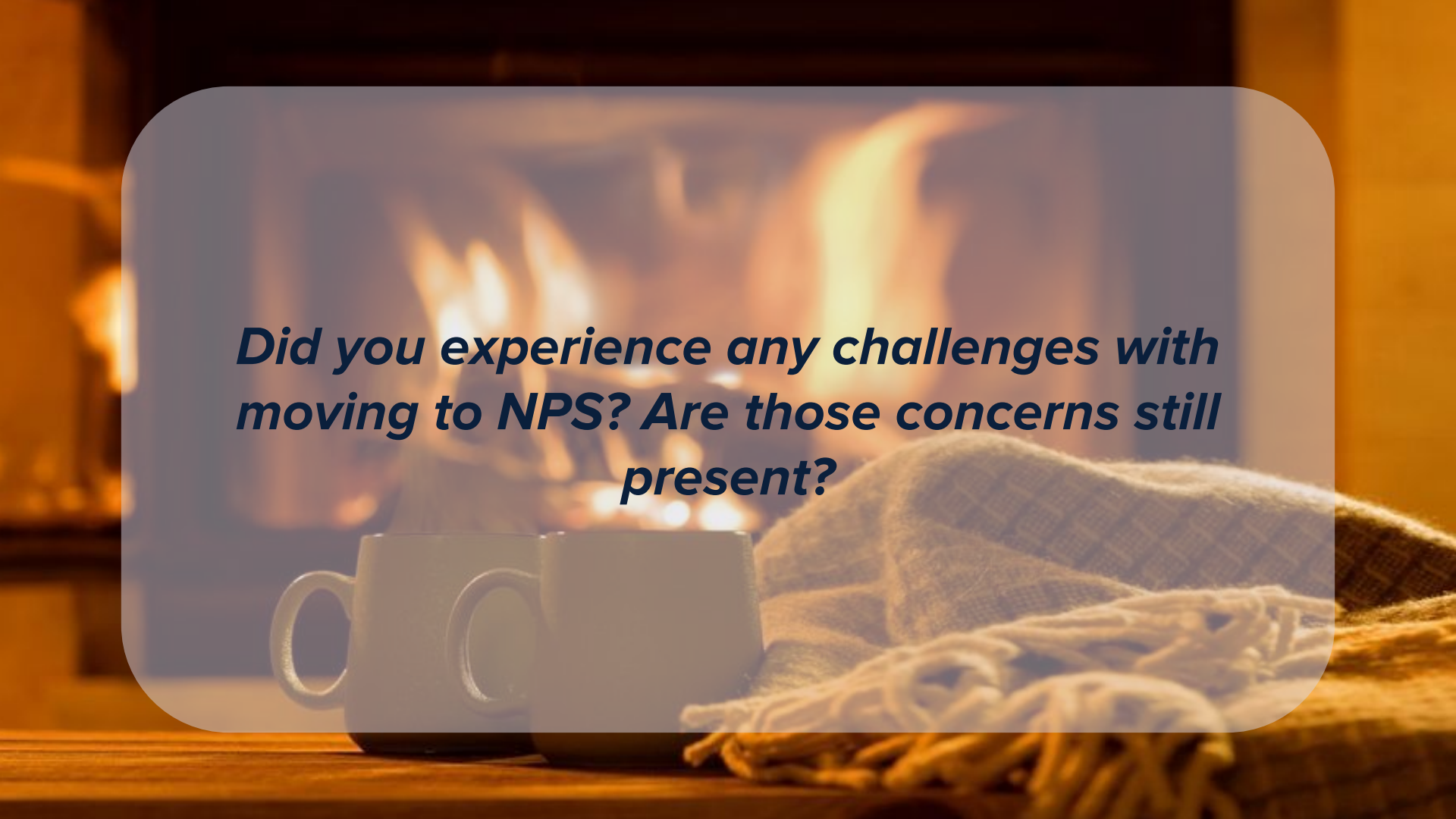
Dr. [redacted] is an excellent doctor. She answers all of my questions and cares for my health.

Dr. [redacted] is the absolute best!



Whoa, look at that comment volume.

7th highest response volume out of 159 child topics



Did you experience any challenges with moving to NPS? Are those concerns still present?

A warm, cozy scene featuring a fireplace with a bright fire in the background. In the foreground, two white mugs sit on a wooden surface next to a light-colored, textured blanket. The entire scene is overlaid with a semi-transparent white rounded rectangle containing text.

How have employees responded to hearing more from patients about the care and services provided?



In the Works:
Recent Program Innovations

Capturing Patient Video Feedback

Leveraged new technology to gather deeper insight by giving patients the option to record video or audio messages regarding their experience

Benefits

Feedback Options

Provides patients with more options for submitting feedback (written vs. video/audio)

Additional Insight

Provides site leadership with additional insight into patient's feedback (i.e. tone, body language)

Boosts Morale

More meaningful than comments, staff appreciative of feedback

Recognition Opportunities

Great way to celebrate team and ability to create reels out of the videos for internal presentations

Videos Embedded in Tool



☺ I have no complaints about my experience with the doctor. 😊 She answered all my questions and I did not feel rushed. 😊 I left my appointment feeling confident and would highly recommend her.



😊 The entire team was attentive and compassionate during my stay following surgery. 😊 I had questions about my medications and the nurse took extra time to walk me through it. 😊 10/10!

Nurse Leader Rounding

Transitioned to new platform for Nurse Leader Rounding on 8/1/23

Surveys mimic the current IP discharge surveys and are being used across NM locations

Yearly engagement review to evaluate questions
Eliminated double-barrel questions

Streamlines patient rounding data and utilizes API feed for easier evaluation and distribution of patient responses

Included care types: IP Acute, General OB, Labor, Behavioral Health, Rehab, Peds, NICU, and ED
Additional notes box to track initiative questions

The screenshot shows the 'Rounding Leader Dashboard' for Northwestern Medicine. At the top right, there is a button labeled 'Rounding Leader Dashboard'. Below the header, there is a section for 'Today's Rounding Forms' with filters for 'Saved Filters' (set to None), 'Time Period' (Today), and 'Reporting Date' (Record Creation Date). A link is provided: 'Click Here for Blank Emergency Department Survey'. The main section is titled 'Today's Rounds' and shows a table of records (1-25 of 106). The table has columns for Department Name, Pt Full Name, MRN, Link to Pt Round, and Round Completed Yesterday?.

Department Name	Pt Full Name	MRN	Link to Pt Round	Round Completed Yesterday?
PH HP3 MED-SURG [50901028]			Link to Pt Round	No
PH HP3 MED-SURG [50901028]			Link to Pt Round	No
PH HP3 MED-SURG [50901028]			Link to Pt Round	No
PH HP3 MED-SURG [50901028]			Link to Pt Round	No
PH HP3 MED-SURG [50901028]			Link to Pt Round	No
PH HP3 MED-SURG [50901028]			Link to Pt Round	No

Guiding principles: Short. Modern. Smart.

A warm, cozy scene featuring a fireplace with a bright fire in the background. In the foreground, two white mugs sit on a wooden surface next to a light-colored, textured blanket. The entire scene is overlaid with a semi-transparent white rounded rectangle containing text.

How are patients, business leaders, and clinical teams responding to this new way of gathering feedback?

A warm, cozy scene featuring a fireplace with a bright fire in the background. In the foreground, two white mugs sit on a wooden surface next to a light-colored, textured blanket. The entire scene is framed by a semi-transparent rounded rectangle.

Were there any lessons learned from implementation or operationalization that you could share?

A warm, cozy scene featuring a fireplace with a bright fire in the background. In the foreground, two white mugs sit on a wooden surface next to a light-colored, textured blanket. The entire scene is framed by a semi-transparent rounded rectangle.

***What's next on the Northern Medicine
humanization journey?***

**Thank you for joining
today's webinar!**

**What questions do
you have?**



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and request a demo**

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Upcoming Events & Programs

WEBINARS

January 9 | How Daily Huddles Launch Conversation to Drive Metric Improvement

January 10 | Discover Your Path: Body of Knowledge Certificate Programs

January 16 | See It, Say It, Save It: Empowering Employees to be a Part of the Solution to Patient Belongings

January 25 | Why it's Vital to Adopt an Aggressive Patient Experience Strategy

CONNECTION CALLS

January 17 | Volunteer Professionals Community Connection Call - Junior Volunteers

PROGRAMS

February 6-27 | Foundations of Volunteer Management



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Thank You

