

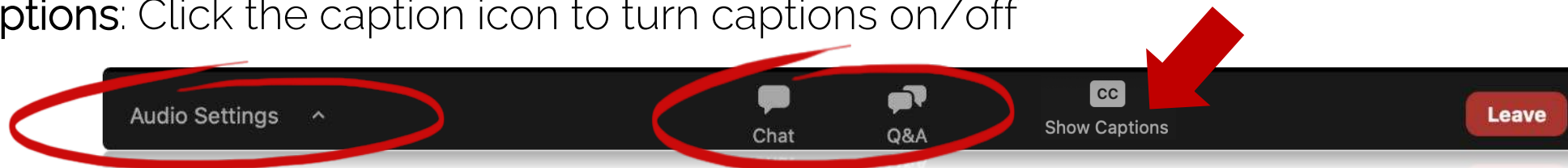
How Daily Huddles Launch Conversation to Drive Metric Improvement

January 9, 2024



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- **Q&A:** for submitting questions to review at the end of the webinar
- **Captions:** Click the caption icon to turn captions on/off



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Our Speakers from Cone Health



Susan Baker
*Director of Operational
Improvement*



Jared Cooper, MBA
Director of General Operations



Marlee Foster
Sr. Patient Experience Manager



How Daily Huddles Launch Conversation to Drive Metric Improvement

Jared Cooper, MBA- Director of General Operations; Susan Baker – Director of Operational Improvement,
Marlee Foster- Sr. Patient Experience Manager



Cone Health Medical Group
Partnering for exceptional care.



Partnered with Ritz
Established Design Team
from all roles in CHMG



Intensive work with Design Team and Ritz
Created and vetted Credo, Motto and Steps of
Services; Enrolled/trained >800 staff and providers;
FY17 Rate the Provider 89.6 (85th percentile)



**Roll out of New Orientation
and 5 Star Service Class**
This time included provider
transparency and 5-star rating
reports for them as well.



Huddles and Action Plans
With the addition of Orientation, 5
Star Service Classes Huddles have
been part of the recommended
standard but not hardwired.



**COVID hit and we needed to
think differently and serve
our patients remotely.**



**Practice Observations and
Partnering with leaders to:**

- Send staff to Orientation
- Have them participate in 5 Star
Service
- Huddle



Culture and Process go together.
We combine the need to huddle and track our metrics, along with
escalating issues in a formalized huddle process.
Our first Group Huddle Message was sent out to help connect everyone to
our Motto, Credo, Steps of Service, and our Values



**All Leaders of each site huddle with the leader- All sites
are set to formalize the daily management program.**
Daily- (except Tuesdays- reserved for Rounding) Sites meet and
review the day, the metrics, and barriers to success. All huddles
start with a review of the message that connects them to
purpose.



**Site Rounding by leaders
and asking about
huddles to verify
Launch for 1 year with
you training for Staff
who has been with us a
full year.**





THE RITZ-CARLTON

The Ritz Carlton's Keys to Success



THE RITZ-CARLTON

CREDO CARD

Credo, Motto, Three Steps of Service, Employee Promise, and 12 Service Values

- Part of their uniform
- Never changes
- Is their culture
- Conversations go back to, or center around contents on Credo card
- Feedback, Reward and Recognition, Empowerment, Growth and Development



EDUCATION

- **Orientation (3 Days)**
 - 2 day focus on culture
 - Assign learning partner
- **Day 21**
 - Full day check-in
 - Collect feedback
 - Re-energize gold standards (Credo Card)
- **Day 365**
 - Psychological Re-Hire
 - Growth & Development Conversations
- **Education Portal/Annual Education Requirements**
 - 250 Hrs.- Staff
 - 350 Hrs.- Leaders



HUDDLES

Daily Huddles and Lineups

- Reward and Recognitions (First in Class Card)
- Review Service Standard of the Day
 - written by Ritz's communication team for all sites
 - shared by rotating staff with personal example
- Property specific information
- Look back and look ahead
- Fun and Inspirational
- All leaders participate





Cone Health Medical Group



CREDO CARD

Credo, Motto, Three Steps of Service



Part of their uniform

- Never changes
- Is their culture
- Conversations go back to, or center around contents on Credo card
- Feedback, Reward and Recognition, Empowerment, Growth and Development



EDUCATION

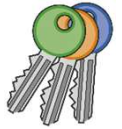
- Orientation ½ Day
 - Focus on culture
- Day 365
 - Psychological Re-Hire
 - Growth & Development Conversations
- 5 Star Service Class is offered to all front-line staff



HUDDLES

Daily Huddles and Lineups

- Celebrations
- Review Service Standard of the Day
 - Written by group of leaders who have volunteers
 - shared by rotating staff with personal example
- Site-specific information
- Review of current goals/metrics to achieve
- Barriers called out and escalated
- All Staff and Providers Participate



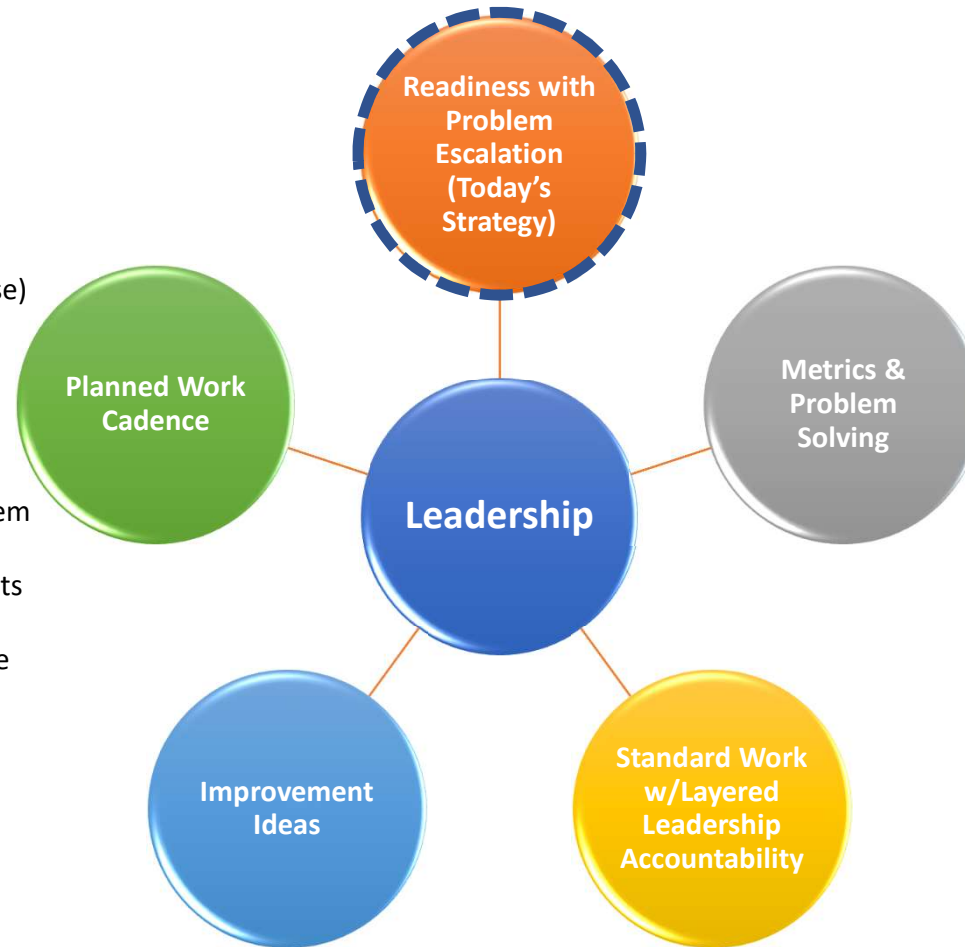
Your Daily Management System

Aligns people and resources

A series of repeatable processes designed to:

- Connect everyone to what's important (Purpose)
- Help Leaders at all levels spot normal from abnormal conditions. (Visual management)
- Identify and proactively address issues that impede our success
- Develop leaders as coaches
- Resolve our "gaps" through team-driven problem solving and A3s
- Sustain breakthroughs from team improvements

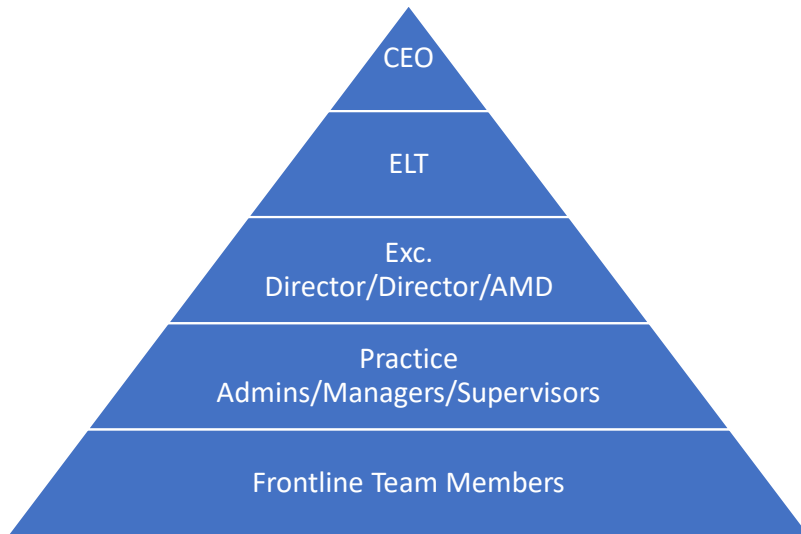
- Building the muscle – Readiness is a great place to start.



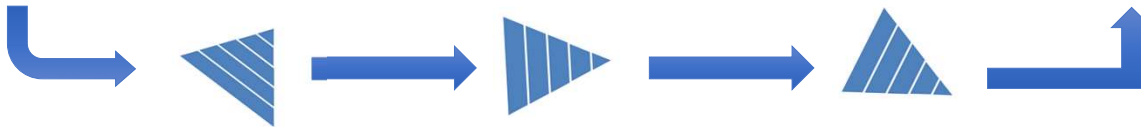
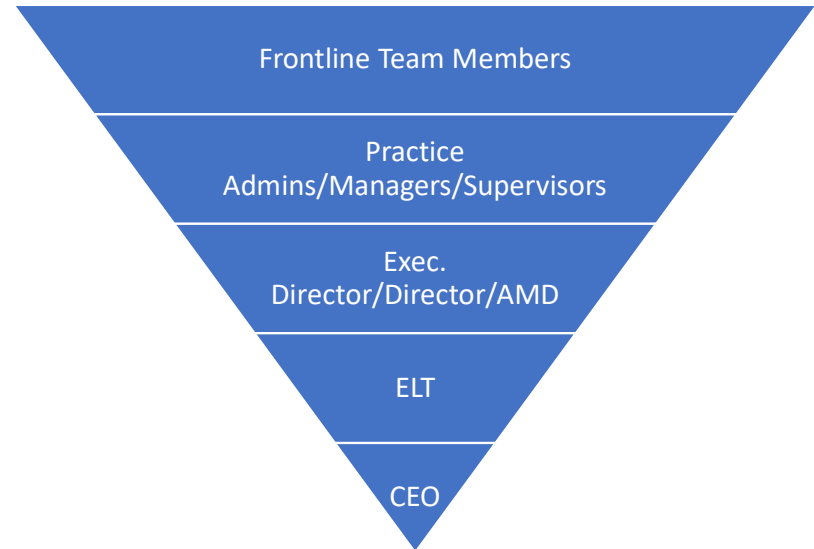
Flipping the Pyramid

We as leaders are learning with you.....

Traditional Management

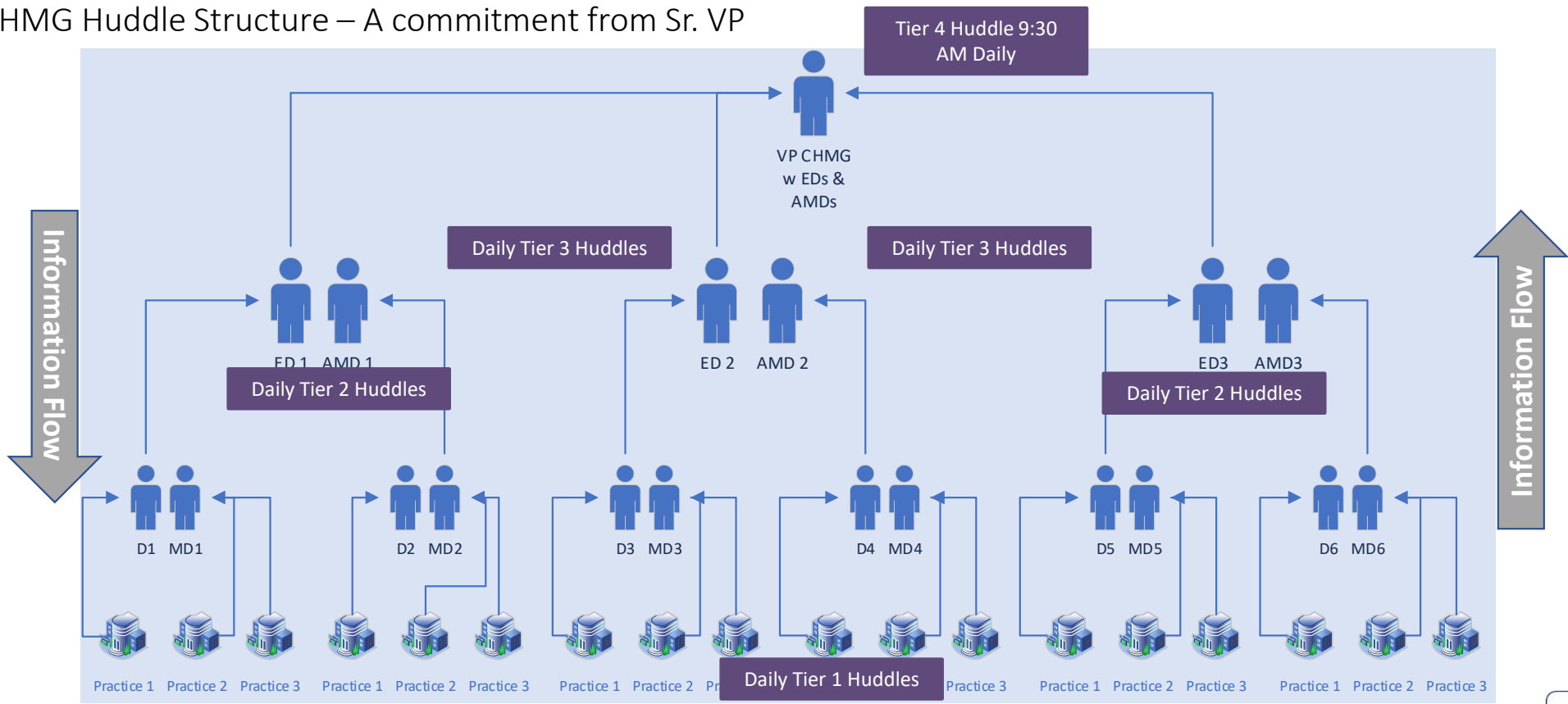


Lean Leadership



Build-in Problem Escalation

CHMG Huddle Structure – A commitment from Sr. VP



To help resolve escalated issues and support front line teams, huddles are tiered. The goal is for information to flow from front line staff to leaders and back to front line staff within 3-4 hours.



Combining our LEAN work and Culture Work



Sample Huddle Message
Emailed to every staff
member at 7am

8 Staff Writers- All
volunteers

Topics Rotate Weekly:
Steps of Service
Credo
Motto
iCare
Commitments
Values

CHMG Huddle Message

Week Theme: Steps of Service

Today's Focus: Exceptional Service

Monday, November 13, 2023



At The Ritz-Carlton,
Ladies and Gentlemen are the most important resource in their service commitment to their guests. By applying the principles of trust, honesty, respect, integrity, and commitment, they nurture and maximize talent to the benefit of each individual and the company.



The Ritz-Carlton fosters a work environment where diversity is valued, quality of life is enhanced, and individual aspirations are fulfilled.

Call to action:

Great customer service means following best practices like valuing customers' time, having a pleasant attitude, and providing knowledgeable and resourceful resources. Show 5-star service today and take that step further to exceed rather than just meet expectations.

Steps

1. Deliver a warm and genuine greeting by acknowledging our patients by name.

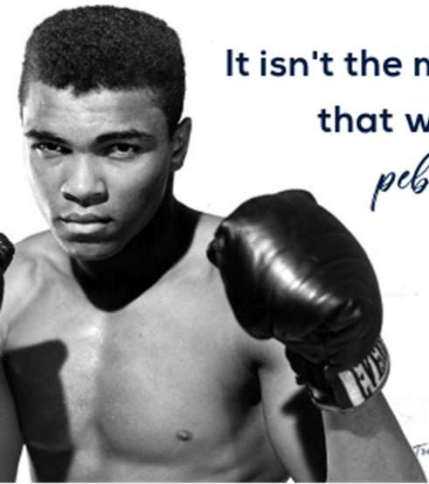
of

2. Anticipate and fulfill each patient's needs.

Service

3. Provide sincere service to every person, every time.

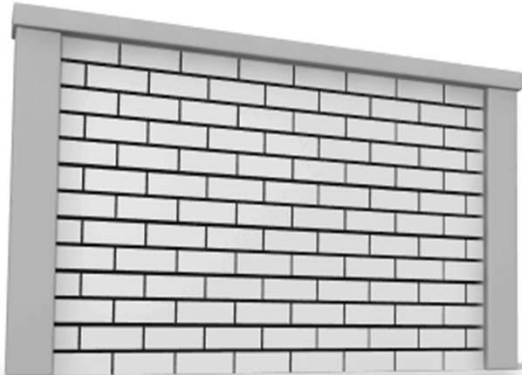
Providers	Rooming	# of Patients	# of Openings	END OF DAY TOTALS		END OF DAY TARGET	Total \$
Dettinger	Ashley H	18	3	CLINICAL MESSAGE POOL	3	5	N/A
Gottschalk	Alyssa	18	0	PRIOR AUTHS	3	5	N/A
Hawks	OFF			RX POOL	5	20	N/A
Ijaola	Kelci	13	3	DENIALS	147	50	\$35,182.52
Rakes	Jessica	19	1	CLAIM EDITS	0	1	\$0.00
Martin	OFF			CHARGE ENTRY	4	15	\$2,428.01
Morgan	Ken	15	0	WEEKLY TELEPHONE CALL LOG			
Stacks	Jaime	6	22	Number of Calls Presented			
Pharm Clinic	Remote	Julie	6	Number of Calls Answered			
AWV	Laura	10	0	Number of calls Abandoned			
Flu Clinic				Avg Length of Call (mins)			
Total Patients Scheduled	105		DOD	Stacks			
Total Open Slots	29		Night/Weekly Call	Stacks			
No Shows Previous Day	7		Prior Auth	x			
Add on Appts	21		Pools	Jan			
MTD AWV	61		Triage	Jan			
TOC CALLS		TOTAL PTS D/C	TOTAL # OF PTS CALLED		QUALITY METRIC GOAL WHERE WE ARE AT WCC 3-21 60% 48% Depression 95% 94% Diabetic Statin 83% 83% AA Control HTN 72% 67% Falls 95% 98% Breast Cancer Screen 72% 72% AWV 54% 62% DM Kidney 45% 50.28% Flu 86% 73.73%		
Monday		Quality					
Tuesday & Thursday		Review Cards					
Wednesday		True North Metrics Scorecard					
Friday		Successes/ Call Volume					
SMESS Review		Front Office	Clinical	Providers			
Safety	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	What are our safety issues today? Safety issues from previous day?
Methods	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Are there any standards or processes that need clarification?



It isn't the mountains ahead to climb
that wear you out; it's the
pebble in your shoe

- MUHAMMAD ALI -

Pebbles in our Shoes



The screenshot displays a 'WRock T1 Huddle Board' with a search bar at the top. The dashboard is organized into five main columns, each representing a different department or area of responsibility. Each column has a header with a plus sign and 'Add task' button, and a list of tasks with completion status and assignees.

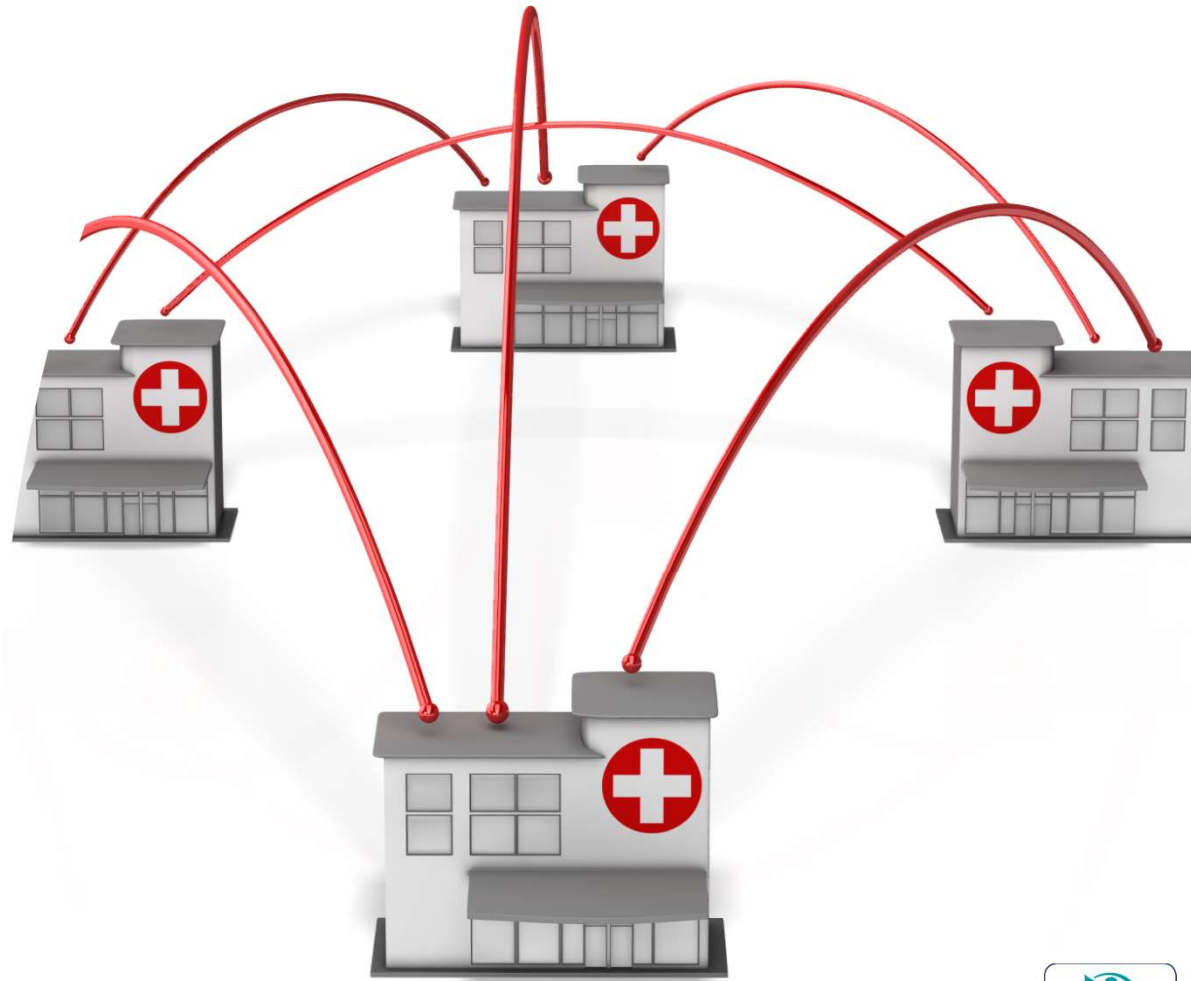
- Clinical:** 124 completed tasks. Tasks include 'Baby Scale side B' (completed 11/25) and 'Printer' (completed by Bullins, Jamie on 11/25).
- Front Office:** 48 completed tasks. Tasks include 'Keypad not working on Janitorial screen' (completed by Wray, Wendy on 11/25) and 'Printer access for billing' (completed by Case, Rhonda on 11/25).
- Lab:** 8 completed tasks. Tasks include 'Lab faucet corroded' (completed by Tucker, Lou on 07/25) and 'Printer' (completed by Holt, Catherine on 11/25).
- Maintenance:** 71 completed tasks. Tasks include 'Sidewalk at front of building' (completed 11/25) and 'AMPHON Access' (completed by Bullins, Melissa on 11/25).
- Providers:** 45 completed tasks. Tasks include 'Genetic for MVM student' (completed by Holt, Catherine on 11/25) and 'Laptop - Christy' (completed by Bullins, Jamie on 11/25).

Connecting Metrics to Process

TN Measures	System	Leader	Division Monthly	Tier 1 - Tier 3 Monthly	LEADING/PROCESS (optional/run to red)	Intention of Process Metric
People	Engagement Scores	Jared Cooper	Voluntary Turnover	Voluntary Turnover	% Completion of Exit Interviews % Intentional Rounding by Manager and up % of Leaders Sending at Least One Cheers	Better understanding of why team members leave Address Respect from Cultural Surveys Address Recognition from Cultural Surveys
Culture	Health Equity Gap in African American Hypertension Control	Rob Slaughter	Health Equity Gap in African American Hypertension Control	Health Equity Gap in African American Hypertension Control	Competency validation of blood pressure skill and elevated blood pressure protocol	Confirmation of Standard Work
Culture	Leadership Representation Manager /Supervisor & above)	Sally Hammond	Leadership Representation (Manager /Supervisor & above)		% Diverse Candidate Pool % Diverse Interview Panel	Promote diversity Promote diversity
Patient Value	Length of Stay	Rob Slaughter	NO CHMG DIVISIONAL RESPONSE	TOC-Hospital F/U Appt Completed within 7 Days Annual Wellness Visits	% Overall Contact Rate % of Completed Calls w/in 2 days % of Due Patients Scheduled	Confirmation of Standard Work Confirmation of Standard Work
Access	# of Digital Engagements	Dr. Laura Murra	# of Digital Engagements	# of Digital Engagements *rollup by PC & specialty (sep) (each department has last years actual + % improvement to get to CHMG target)	Weekly Total Digital Engagements	Confirmation of Standard Work
Growth	% Increase in Unique Patients	Justin Kyle	% Increase in Unique Patients	% Increase in Unique Patients Calendar Days to New Patient Appt Likelihood to Recommend	PWC New Patient Loss improvement Referral Gold Star Reporting (% at Silver) Reviewing of Patient Comments in Weekly Huddles	Ensuring Availability for New Patients Keeping Care Local/Access Confirmation of Standard Work
Finance	Margin	Chris Brown	CHMG Operating Margin	Monthly Visits % of Target (each department has last years actual + mitigation % improvement to get to CHMG target) (actual /target) Practice Actual Margin (each department has last years actual + mitigation % improvement to get to CHMG target)	Provider Utilization POS Collections Visits Per Day % of Target Closed Encounters	Contribution to Margin Understanding of Posted Visit Volume Compared to Target Major Contribution to Margin Understanding of Posted Visit Volume Compared to Target

Everyone Is working toward the same goals

- By talking about the same huddle messages every day all sites are grounded in the same messages around culture.
- These messages set tone for our conversations on metrics and how we can make improvements.
- The daily structure allows us to identify barriers to success with our leaders and work toward solutions.





Cone Health Medical Group
Partnering for exceptional care.

Questions?

Thank you for joining us today.

Marlee Foster- marlee.foster@conehealth.com

Jared Cooper- jared.cooper@conehealth.com

Susan Baker- susan.baker2@conehealth.com

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Upcoming Events & Programs

WEBINARS

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 23 | Empowering Families in the NICU: The Transformative Impact of Family Integrated Care

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

January 30 | Improving The Patient Experience by Adopting a Culture of Safety

CONNECTION CALLS

January 17 | Volunteer Professionals Community Connection Call - Junior Volunteers

PROGRAMS

February 6-27 | Foundations of Volunteer Management



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Dennis W. Pullin

President & CEO, Virtua Health



Rick Guidotti

Photographer & Founder, POSITIVE EXPOSURE



Samantha Harris

Breast Cancer Survivor, Emmy-Winning TV Host

Thank You

