



Tools to Measure Communication Skills

ACE Academy-Session #2
December 16, 2014

ACE Academy

Funded by Blue Shield of California Foundation



Virtual learning series on techniques to build a culture of strong communication skills in healthcare organizations

ACE Academy Curriculum (subject to change)		
Session	Dates	Topic
1	Oct-14	Overview: Patient-Centered Care Starts with Empathic Communication
2	Dec-14	Tools to Measure Communication Skills
3	Feb-15	Strengthening provider communication training
4	Apr-15	Techniques to reinforce communication skills in your organization
5	Jun-15	Incorporating communication skills into job descriptions, annual review, and separation processes
6	Aug-15	Strengthening recruitment and hiring practices

ACE Academy Resources



www.advancingcommunication.com

A space for
resource
sharing and
idea
exchange

Advancing Communication Excellence

*A joint initiative of the Center for Care
Innovations and Blue Shield of
California Foundation*

[ACE Initiative Overview](#) [ACE Academy](#) [Grantee Resources](#)

ACE Academy

The ACE Academy is virtual learning series on the essential components of building and sustaining a culture of communication excellence in a healthcare organization. The ACE Academy is intended to provide ongoing learning opportunities for ACE grantees, as well as other healthcare organizations that have implemented communication training programs in their organizations.

This ACE Academy website is a space for resource sharing and idea exchange. All of the ACE Academy webinar materials will be posted here, as well as additional resources to support your organization's work on furthering patient-centered communication.

Resources
■ [HR Tools \(5\)](#)

[ACE Academy Curriculum](#)



Measuring Patient Communication at Your Practice

Presented by
SullivanLuallin *Group*



Objectives

- Review the rationale for patient-centered communication
- Discuss strategies for measuring patient communication
- Review patient communication assessment tools

SullivanLuallin Group

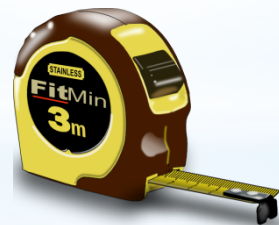
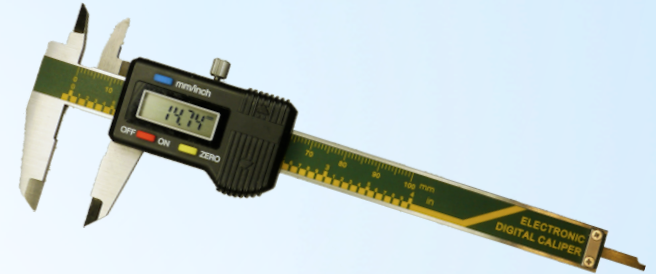
- 25+ years' experience in consulting with healthcare organizations to assess their service performance and improve the patient experience:
 - Patient, employee and referring physician satisfaction surveys
 - Customer service training
 - Mystery patient calls and visits
 - Shadow coaching for low-scoring physicians
 - *Additional improvement and ongoing momentum consulting*

Benefits of patient satisfaction

- More patient loyalty/word-of-mouth referrals
- Higher staff morale/lower turn-over
- Better risk management
- Enhanced public image/market share
- Greater pride in your practice
- Better outcomes

How does your practice measure communication with patients?

- Patient satisfaction surveys
- Mystery calls
- Mystery patient visits
- Post-visit telephone interviews
- Other?



**How do you “max” your
patient experience
assessment?**

**Know what your patients
are expecting!**

Patient communication assessment tools

- Mystery call checklist

Mystery call checklist



Site:

Time:

	COMMENTS:

Patient communication assessment tools

- Mystery call checklist
- Mystery patient - scheduling appointment checklist

Mystery patient - Scheduling appointment checklist



Site:

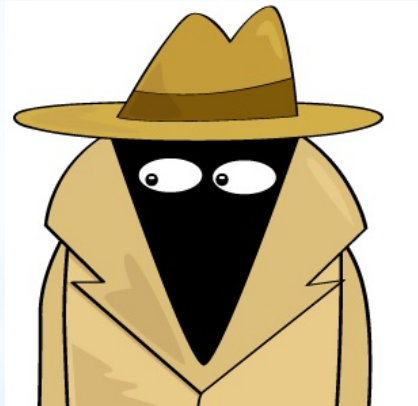
Time:

COMMENTS:	

Patient communication assessment tools

- Mystery call check list
- Mystery patient - scheduling appointment checklist
- Mystery patient visit checklist

Mystery patient visit checklist



Client:	Doctor:	Patient Name:			
Site:					
PHYSICAL ASPECTS of OUTER OFFICE:		Registration Lobby			
		Y	N	NA	
Directions and signage clear?					
Pleasant ambient environment?					
Was the temperature comfortable?					
Area clean and orderly?					
Furniture clean and comfortable?					
Reading materials neat and current?					
Signage to restrooms clear?					
Restrooms easily accessible?					
Rest rooms clean?					
REGISTRATION ENCOUNTER					
		Y	N	NA	
Made eye contact with patient?					
Introduced self to patient? (if new patient)					
Wearing ID badge?					
Is ID badge easily visible to patient?					
Dressed appropriately/professionally?					
Personal appearance - well groomed?					
Smiled when addressing patient?					
Said "Please" & "Thank you"?					
Was staff friendly with each other?					
If on the phone, acknowledged waiting patient with smile/ gesture?					
Demonstrated respect for patient privacy?					
Addressed patient by name?					
If any, were complaints handled discretely & diplomatically?					
Receptionist told patient what to expect & gave clear instructions during encounter?					
Receptionist kept patient apprised of wait status?					
ROOMING ENCOUNTER Medical Assistant					
		Y	N	NA	
MA waited for patient to come to doorway?					
Made eye contact with patient?					
Introduced self to patient?					
Wearing ID badge?					
Is ID badge easily visible to patient?					
Dressed appropriately/professionally?					
Personal appearance - well groomed?					
Smiled when addressing patient?					
Said "Please" & "Thank you" ?					
Was staff friendly with each other?					
Demonstrated respect for patient privacy?					
Addressed patient by name?					

Live Encounter – Service Evaluation

Date: _____ **Time:** _____

EXAM ROOM:					
		Y	N	NA	
Temperature comfortable?					
MA kept patients apprised of wait status?					
MA was careful to maintain patient confidentiality?					
MA gave clear instructions once in the room?					
MA made you feel comfortable?					
MA helped you understand what to expect?					
MA asked if you had questions before leaving?					
PHYSICIAN:					
		Y	N	NA	
Knocked before entering exam room					
Gave friendly greeting, handshake/touch					
Allowed you to finish describing the problem					
Was seated, gave good eye contact					
Asked if you had any other issues					
Did the doctor include you while using the EHR					
Explained things in understandable way					
Gave you written information/instructions					
On leaving asked if you had other questions					
Gave warm, friendly handshake/touch					
Did you receive a positive parting comment from anyone as you left the office?					
LENGTH OF WAIT (minutes):					
	<5	6-10	11-15	>16	
In Line					
In Registration Area					
In Exam Room					

Client:
Site:

Doctor:

Patient Name:

Live Encounter – Service Evaluation
Date:Time:

SUMMARY OF IMPRESSIONS:

Registration Experience:

Experience with MA:

Experience with Provider:

Impressions/Other Comments:

■ Sample mystery patient visit – Summary of Impressions

Client: XX
Site: Emergency Department
SUMMARY OF IMPRESSIONS:

Registration Experience:

I arrived at the emergency department at 10:15 AM on Sunday, April 15th. There was a roped off area in the registration area which indicated the area to stand in line. Shortly after I approached the registration line I heard, "Um excuse me. Are you getting in line to see a doctor?" I turned to my left and saw a woman named Anece behind a computer. I confirmed that I was in line to see a doctor and she asked for my insurance card and ID. She proceeded to ask me a series of questions ranging from my marital status, employment, address, emergency contact information, religious preference, and reason for the visit. Anece was very friendly as she engaged in small talk and told me,

Experience with MA:

At 10:32 AM Luis stood at the door of "Triage A" and raised his voice as he said, "Ms. Sutherland." I walked up to the door and he told me to take a seat. He explained that he was going to take my vitals. Luis didn't interact with me as he was talking my vitals. I attempted to engage in small talk, to which he didn't respond. After he was done taking my vitals Luis said, "Okay Ms. Sutherland, please take a seat and we'll call your name shortly." Again, Luis was very professional and thorough, but did not particularly go out of his way to be friendly or make me feel comfortable. As I was sitting in the reception area, I noticed the facility was very clean and relatively

Patient Name: XX

Live Encounter – Service Evaluation

Date: XX Time: XX

Experience with Provider:

At 10:53 AM I heard a knock at the door and I said, "Come in." A gentlemen walked in the room, shook my hand, smiled, and introduced himself as Dr. Lee. I introduced myself and he immediately took a seat so he was at eye-level with me. He asked me what brought me in, and empathized with me as I described my symptoms of the pain I was experiencing. He asked me a series of questions, and made me feel comfortable throughout the exam. He provided me with a diagnosis and seemed very knowledgeable as he described why I might be experiencing the back pain. Dr. Lee then explained in detail the medication that'll help address my pain, and advised me to

Impressions/Other Comments:

As I was walking out towards the checkout area I saw Luis. He waved, said hello and explained the direction I needed to walk in to check-out. During my first two encounters with Luis he didn't leave me with a great impression; however, I felt he redeemed himself with his nice gesture and friendly attitude as I was leaving. I immediately walked up to the check-out counter and noticed two individuals behind the desk (Aaron and Elizabeth). Elizabeth greeted me with a smile as I walked up to her window. She explained that I had a co-pay of \$150 for the visit. I told Elizabeth that I only had \$50.00 cash and would like the remaining

Patient communication assessment tools

- Mystery call check list
- Mystery patient - scheduling appointment checklist
- Mystery patient visit checklist
- “Sit & See” Observation checklist

“Sit & See” checklist



SIT-N-SEE OBSERVATION:

Site:

Date: Time:

PHYSICAL ASPECTS:	Registration Lobby				Waiting Area		
	Y	N	NA		Y	N	NA
Directions and signage clear?							
Pleasant ambient noise?							
Area clean and orderly?							
Temperature comfortable?							
Furniture clean and comfortable?							
RECEPTIONIST PROFESSIONAL APPEARANCE & DEMEANOR							
					Y	N	NA
Wearing name badge?							
Is name badge easily visible to patient?							
Dressed appropriately/professionally?							
Personal appearance - well groomed?							
Made eye contact with patient?							
Treated patient in friendly, helpful manner?							
REGISTRATION PROCEDURE							
					Y	N	NA
If patients in line, acknowledged?							
Used appropriate language to invite patient to approach desk?							
Greeted patient with a genuine smile?							
Effectively used body language/ words to make patient comfortable?							
Conveyed an attitude of sincere warmth, helpfulness during the encounter?							
Used appropriate language when asking for co-pay?							
If on the phone, acknowledged waiting patient with smile or gesture?							
Did co-workers assist each other and/or demonstrate cooperation?							
Did co-workers avoid inappropriate side-talking?							
Were special needs addressed (if applicable)?							
If any, were complaints handled appropriately?							
Gave clear directions/instructions at end of encounter?							
Asked, "Is there anything else I can help you with?"							
Closed encounter with a smile, and/or a friendly parting comment?							
NURSE:							
Addressed patients by first and last names?							
Waited for patients to come to doorway?							
Introduced self to patients?							
Volunteered updates on waiting time?							
Was patient privacy respected?							
General impression of RECEPTION STAFF demeanor:							
Friendly POLITE Disinterested Unfriendly							
General impression of MEDICAL ASSISTANT/NURSE demeanor:							
FRIENDLY Polite Disinterested Unfriendly							

GENERAL OBSERVATIONS	
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Patient communication assessment tools

- Mystery call checklist
- Mystery patient - scheduling appointment checklist
- Mystery patient visit checklist
- “Sit & See” Observation checklist
- Post-visit telephone interview guide

Post-visit telephone interview guide



WHEN YOU ARRIVED FOR YOUR APPOINTMENT:

Were you greeted with a smile?	YES	NO
Did everyone wear their name badge so you could easily see it?	YES	NO
Were you kept informed about how long your wait would be?	YES	NO
Was our staff friendly and professional?	YES	NO

GOING TO THE EXAM ROOM

Were you called from the reception area in a courteous manner?	YES	NO
Did the Nurse/Medical Assistant smile and introduce him/herself?	YES	NO
Did the Nurse/Medical Assistant make you feel comfortable?	YES	NO
Did the Nurse/Medical Assistant help you understand what to expect?	YES	NO
Were you kept informed about how long your wait would be?	YES	NO
Was our staff friendly and professional?	YES	NO

YOUR VISIT WITH THE PROVIDER

Did the provider knock before entering the exam room?	YES	NO
Did the provider greet you in a friendly manner?	YES	NO
Did the provider listen carefully to you?	YES	NO
Did the provider explain things clearly to you?	YES	NO
Did the provider spend enough time with you?	YES	NO
Did the provider clearly answer all your questions?	YES	NO

CHECK-OUT/DEPARTURE

Did you receive a friendly “good-bye?”	YES	NO
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YOUR OVERALL SATISFACTION

Please rate your overall experience (circle one)

EXCELLENT VERY GOOD GOOD FAIR POOR

WAS ANYONE PARTICULARLY HELPFUL TO YOU:

But...

**...before you measure
communication, do your employees
know what's expected of them?**

The assessment strategies
depend on implementing a
consistent customer
service model

S.T.A.R.T.
with **Heart**™

C.L.E.A.
R.®

A
I
D
E
T

Treating Patients
With C.A.R.E.

After you measure the
patient experience...

*Implement improvement
strategies!*

Improvement strategies

- Service model checklists to hold employees accountable

<i>Staff Competency Observation Tool</i>					Date:
STAFF NAME:	EMPLOYEE NUMBER:	JOB TITLE:	DEPARTMENT:	PT: Patient Observation or	
MANAGER/VALIDATOR NAME:				MET=V	RP: Role Play
TECHNIQUE- CLEAR	COMPETENCY ELEMENT	TRAINING	SELF-ASSESSMENT	VALIDATION	
<i>Connect</i>	1. Acknowledges patients as soon as possible				
	2. Establishes eye contact/smiles				
	3. Introduces self				
	4. Uses the patient's name				
	5. Says "please" and "thank you"				
<i>Listen</i>	6. Keeps voice warm, calm, and welcoming				
	7. Repeats information to confirm accuracy				
	8. Responds with empathy to patient concerns				
<i>Explain</i>	9. Describes what's going to happen; explains process in layperson's language				
	10. Lets patients know about delays and checks back every 15 minutes with waiting patients				
<i>Ask</i>	11. Checks for understanding				
	12. Asks if the patient needs anything else and if needs are taken care of				
<i>Re-connect</i>	13. Helps patients find the next location or the next step in the care process				
	14. Ends with a friendly parting comment				
MANAGE-UP	15. Makes a positive reference about another team member in conversation				
THANK & RECOGNIZE	16. Demonstrates with another team member the ability to thank and recognize a behavior, attitude, or specific act				

Improvement strategies

- Service model checklists to hold employees accountable
- Hold daily “hallway huddles”

Improvement strategies

- Service model checklists to hold employees accountable
- Hold daily “hallway huddles”
- Round on both employees and patients

ROUNDING ON DIRECT REPORTS	
Name	Month/Year
*** Make A Personal Connection ***	
What's working well?	
Staff or physicians I should recognize?	
Systems or processes that need improvement?	
Do you have the tools and equipment to do your job?	
Is there anything else I can help you with right now?	

Improvement strategies

- Service model checklists to hold employees accountable
- Hold daily “hallway huddles”
- Round on both employees and patients
- On-the-spot recognition

Improvement strategies

- Service model checklists to hold employees accountable
- Hold daily “hallway huddles”
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- Shadow coaching for low-scoring providers

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- Service model checklists to hold employees accountable
- Hold daily “hallway huddles”
- Round on both employees and patients
- On-the-spot recognition
- Shadow coaching for low-scoring providers
- Customer service training

Improvement strategies

- Service model checklists to hold employees accountable
- Hold daily “hallway huddles”
- Round on both employees and patients
- On-the-spot recognition
- Shadow coaching for low-scoring providers
- Customer service training
- Ongoing measurement tools

Question & answer time!



Thank you!

Barbara@SullivanLuallinGroup.com

SullivanLuallin *Group*

The Patient Experience Transformation Company

Reminder about Resources



ACE Program Website: www.advancingcommunication.com

Communication Assessment Toolkit is posted on the ACE program website under “Measurement Tools”.

Communication Assessment Toolkit- Sullivan-LuallinGroup

[Leave a reply](#)

Communication Assessment Toolkit- SullivanLuallin Group

This document contains a selection a tools developed by the [SullivanLuallin Group](#) that your organization can use to directly assess the communication skills of your staff. Tools include:

- Mystery patient- scheduling appointment checklist
- Mystery patient visit checklist

RESOURCES

- 1. [GENERAL RESOURCES](#) (27)
 - [Abstracts and Bibliographies](#) (5)
 - [ACE Academy Webinars](#) (3)
 - [HR Tools](#) (7)
 - [Management Tools](#) (5)
 - [Measurement Tools](#) (4)
 - [Physician empathy and treatment outcomes](#) (5)
- 2. [TREATING PATIENTS WITH CARE](#) (22)
 - [CARE Training Implementation Tools](#) (6)
 - [IHC-CARE Administrative Documents](#) (6)
 - [IHC-CARE Training Materials](#) (7)
- 3. [COACHING FOR IMPRESSIVE CARE](#) (4)
 - [IHC-CFIC Administrative Documents](#) (4)

Today’s webinar recording and slides will be posted by tomorrow morning.