Consumer-Centric Patient Education

Using VOC Tools to Understand Patient-Family Needs To Drive Transformation
From motivating patients to become proactive in their healthcare, to reducing anxiety and preparing them for what to expect, a solid patient education strategy and consistent implementation is critical for successful outcomes and experiences.

We lever our previous experience with national leaders in healthcare to help you design the strategy and deploy the tools to provide comprehensive and effective patient education as part of your holistic experience management.

Our experience management work directly pertains to this assignment. Involved in this project will be professionals who have worked with clients across the country on objectives like yours.
Patient education touchpoints meet functional needs – what to do and emotional needs – like alleviating anxiety. The key is understanding how to meet patients, their families and even their referring physicians where they are.

**OVERCOME COMMON CHALLENGES**

*Patient Education*

1. Gathering relevant input to better understand needs and target action
2. Providing a consistent, streamlined experience
3. Finding innovative ways to deliver patient education when and how patients need it
4. Equipping your team with insight & tools to grow advocacy and, ultimately, revenue
OUR VIEW
Set, Met, Reinforced – The Key to Experience Management

We believe that culture and your brand promise are linked through the experience delivered.

Leaders translate customer expectations to the organization, assign priorities and reinforce expected behaviors.

We intentionally examine the differences between functional needs (what is done) with emotional needs (how patients feel about the interactions).

Alignment with expectations creates an exceptional experience and a sustainable competitive advantage.
BUILD EMPATHY
Appreciating Different Types of Needs

Functional
- Awareness
- Accessibility
- Confidence in Care
- Care Coordination
- Follow-Up Care Planning

Emotional
- Respect for Time
- Inclusion in the Process
- Feeling Listened To
- Personalized Care
- Education and Empowerment
STEPS TO TRANSFORM THE EXPERIENCE

Our process is customizable, efficient, and agile to bring the most value and results.

- **ENVISION**: What do your customers want, and in what ways can we improve to meet these needs?
- **ENGAGE**: How can we engage and align others across the organization in deliver this change?
- **ENERGIZE**: What processes and systems need to be changed for this to be successful?
- **ENABLE**: How well is it working, and what is necessary to make this sustainable?
We organize all activities using an experience map. The map frames the patient experience in terms of their activities, your key touchpoints, and touchpoint stewards. The experience map will be customized to focus on patient education.
# GET DEEP ON EDUCATION

Examing the Experience Holistically...with a Patient Education Lens

<table>
<thead>
<tr>
<th>Need</th>
<th>Scheduling</th>
<th>Arrival</th>
<th>Treatment</th>
<th>Follow-up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Symptoms</td>
<td>Choosing and contacting center</td>
<td>Getting to the facility, parking and on-site navigation</td>
<td>In-room interactions</td>
<td>Completion of treatment, discharge from therapy</td>
</tr>
<tr>
<td>Diagnostic chronic</td>
<td></td>
<td>Checking in</td>
<td>Discussion of treatment options</td>
<td></td>
</tr>
<tr>
<td>Pre-existing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Related conditions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Needs Assessment</td>
<td>Timing</td>
<td>Involvement of Others</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Referral or recommendation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluation and</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Content**

- Consumer Pain Points
- Frequently Asked Questions
- Things They Need to Know

**Context**

- Needs Assessment
- Timing
- Involvement of Others

**Channels**

- Selection of healthcare providers
- Navigating where to seek treatment
- Paperwork/records
- Resources provided
- Preparing for the visit
- Maps, travel, accommodations, etc.
- Provider/timing options

**Competence**

- Functional vs. Emotional Delivery Method(s)
- Reinforcement Method(s)
- Assessment Method(s)
- Compliance
- Usage (staff)

**Assessment Method(s)**

- Interactions with physicians and clinical staff
- Coordination with referrer
- Transition of care
- Billing
- Follow-up visits
- Prevention and ongoing wellness
GET AGILE
Realizing Business Results Faster

**Transfer**
Translate Lessons Learned Across Teams

**Dashboard**
Monitor Key Performance Indicators to Celebrate Success and Course Correct

**Insights**
Prioritize Focus Areas by Impact, VOE and VOC input

**Workshops**
Host Cross-Functional Experience Design Activities for Action Planning
OUR TOOLS FOR TRANSFORMING THE EXPERIENCE
Endeavor has a rich toolkit to design and operationalize the ideal consumer experience

ENVISION

Alignment Activities
• Stakeholder identification
• Charter program team
• Information review/inventory
• Experience map (framing)
• Leading and lagging KPIs

Experience Mapping
• VOE: Staff Interviews
• VOC: Patient experience interviews
• Define segments and create personas
• Reporting – Day in the Life, Touchpoint prioritization
• Current State Assessment

ENGAGE

Redesigning the current experience
• Ideal experience workshop
• Expected behaviors workshops
• Process mapping workshops
• Message mapping workshops
• Agile action workshops
• Change readiness assessment

Leading the transformation
• Leadership alignment workshop with blueprint for the future
• Change leadership coaching
• Implement a cultural champions network (attitudes, beliefs, behaviors)

ENERGIZE

Communicating the vision
• Internal communications strategy and feedback plan
• Implement transformation progress dashboard

Reinforcing the desired experience
• Highlight positive movements or changes
• Showcase model behaviors, attitudes, beliefs through leader-led training

Monitoring changes in experience delivery
• Conduct facilitated observations
• Pilot / Implement key elements of the ideal experience
• Test and refine rollout

ENABLE

Long-term Implementation Plan
• Deploy across other services/areas
• Define the organizational process to implementing changes
• On-going leadership messaging
• Design performance management process

Experience Sustainability Plan (concurrent)
• Define new employee/team on-boarding
• Define reinforcement / refresh activities

Long-term Sustainability Measurement
• Establish experience monitoring and feedback "dashboard"
• Model churn / establish personalization systems

Activities

Outcomes

• A deep understanding of what your customers value
• Where you can improve in meeting their needs
• Vision of the future state

• The vision is translated to operational and organizational changes
• Alignment across key stakeholders on the plan moving forward

• The organization is motivated and mobilized to adopt the changes
• Related processes and systems are changed
• The plan is validated and refined to ensure long-term sustainability

• The changes are ingrained into the organization’s culture for sustainability
• Customer experience management is an ongoing thing rather than a periodic intervention
DEVELOP INSIGHTS
Translating VOC into Actionable Deliverables

Assessment of performance, touchpoints, and functional/emotional needs at each stage

EXPERIENCE

Need
Scheduling
First Visit
Treatment
Follow-Up

Reassurance
Confidence
Preparation
Support Options

Resources and a point of connection so that they feel well-prepared for the first visit
Knowing that this is the best treatment pathway (and mini-maximization of pain and side effects)
Detailed understanding of continuum of side effects and at-home care instructions
Help managing ongoing emotional and physical needs

Tools to Build Confidence in Treatment Decision-Making

Facilitators
- Meeting with surgeon and oncologist together
- Ample time spent with patient
- Confidence, expertise, and specialization of doctor
- Giving patients a sense of control and partnership

Recommendations
- Knowing what to consider and how to prepare in advance of visit
- Tools to take notes during the first visit
- Trusted research and data for conducting additional research
- Accessible real stories from other patients (including the hard parts)
- Detailed understanding of potential side effects

Barriers
- Contracting information online (what to trust)
- No one “right” decision at times
- Side effects are mentioned, but not truly understood
- When side effects are worse than expected, patient opinion decision

Focus areas for support resources and educational materials

- “Ways that you can manage a roller coaster of emotions are...”
- “Other patients have found it helpful to...”

- “Habits that can help you stay healthy are...”
- “You and your partner can remain close by...”
- “You should ask your doctor for help if...”
- “Tips for managing social and work situations are...”
- “Habits that can help you stay healthy are...”

Identification of segment-specific needs

Medication Management
Go-to contact for help managing many medications, including quick resolution if prescription was not called in as expected

Home Care
Need a pathway for quick resolution of questions or problems post surgery, such as infections or urinary retention, ability to avoid the ER when possible. Ideal is a proactive check-in call post-discharge.

Instructions
Need more detailed home care instructions prior to discharge, including multiple formats (verbal, written, visual)

https://www.endeavormgmt.com/resource/improving-patient-enchantment
FUSE INSIGHTS AND ACTION
Updating the Shared View of Understanding and the Future Direction

THE JOURNEY | High Performance | Moderate Performance | Low Performance

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Decision Making</th>
<th>Scheduling</th>
<th>Treatment</th>
<th>Transition of Care</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Hospital provides top-notch cancer treatment and keeps me updated about their services and specialists.&quot;</td>
<td>&quot;I am confident that Hospital will provide the best clinical care and an easy experience.&quot;</td>
<td>&quot;It is easy for me to initiate a referral, and patients receive appointments quickly.&quot;</td>
<td>&quot;My patients receive excellent care and I am updated throughout their journey.&quot;</td>
<td>&quot;I have a clear on-going care plan and the Hospital team is accessible should any problems arise.&quot;</td>
</tr>
</tbody>
</table>

- Perceptions about and knowledge of UHealth and Hospital
- Ideal relationship with UHealth and Hospital
- Evaluation and selection of oncology providers
- Discussion with patient and family
- Assessment of provider
- Preparing patients for what to expect
- Initial contact
- Timing and ease of process
- Appointment confirmation
- Scheduling assistance provided to patients
- Coordination of care with specialist
- Progress notes and methods of communication
- Patient feedback about their experience
- Phone calls for assistance

**WHAT WE LEARNED**
- Confidence in clinical outcomes is high, but service excellence is a needed improvement
  - a. Brand awareness is high, and clinical outcomes are highly regarded
  - b. The most complex cases are referred to Hospital – but straightforward cases are referred elsewhere due to an easier experience
  - c. Competition from local oncologists and Baptist Health is increasing, resulting in lost referrals and a critical need to provide an excellent referral experience
- Confidence in clinical outcomes is high, but service excellence is a needed improvement
  - a. Brand awareness is high, and clinical outcomes are highly regarded
  - b. The most complex cases are referred to Hospital – but straightforward cases are referred elsewhere due to an easier experience
  - c. Competition from local oncologists and Baptist Health is increasing, resulting in lost referrals and a critical need to provide an excellent referral experience
- Confidence in clinical outcomes is high, but service excellence is a needed improvement
  - a. Brand awareness is high, and clinical outcomes are highly regarded
  - b. The most complex cases are referred to Hospital – but straightforward cases are referred elsewhere due to an easier experience
  - c. Competition from local oncologists and Baptist Health is increasing, resulting in lost referrals and a critical need to provide an excellent referral experience
- Confidence in clinical outcomes is high, but service excellence is a needed improvement
  - a. Brand awareness is high, and clinical outcomes are highly regarded
  - b. The most complex cases are referred to Hospital – but straightforward cases are referred elsewhere due to an easier experience
  - c. Competition from local oncologists and Baptist Health is increasing, resulting in lost referrals and a critical need to provide an excellent referral experience
- Confidence in clinical outcomes is high, but service excellence is a needed improvement
  - a. Brand awareness is high, and clinical outcomes are highly regarded
  - b. The most complex cases are referred to Hospital – but straightforward cases are referred elsewhere due to an easier experience
  - c. Competition from local oncologists and Baptist Health is increasing, resulting in lost referrals and a critical need to provide an excellent referral experience

**TACTICAL RECOMMENDATIONS**

1. Referral Process
   - a. Ensure all physicians receive consistent focused updates
   - b. Improve processes for capturing referral information and transmitting updates
   - c. Create clear on-going care next steps; ideally call to discuss transition of care

2. Access
   - a. Reduce information required to secure an appointment
   - b. Create easy pathways to get in touch with the right person
   - c. Always return messages and send appointment confirmations

3. Communication
   - a. Distribute a directory with details of specialists and treatment options
   - b. Digitally update referrers regularly on clinical trials, new specialists, or other news
   - c. Develop dedicated referrer webpage

4. Outreach
   - a. Reach out through liaisons, lunch and learns, and opportunities for relationship development
   - b. Educate physicians on "getting the diagnosis right" with resources for when to refer
   - c. Create an engagement plan that includes opportunities to share expertise outside of UHealth or a specific referral

**QUOTES**

"I would like to know more about what specifically they are doing that is new, and how to make it a referral there. How do I reach them?"

"I need to know more about the satellites - which specialists are where and what service area each specialist focuses on."

"The main reason I do not refer to Hospital more often is because referring a patient and booking the first appointment is a terrible experience for the referring physician."

"Families don’t complain about the physicians or the treatment, but they don’t have a way to get in touch with people if they have questions. They aren’t able to get through to the right person or get calls returned."

"The oncologists never get bad with me. When I do call and ask if there is a specialist’s note or just anything about my patient I never receive anything, and the times when I have called the physician myself they were rude to me."

"The communication issues are one of the main reasons that I don’t refer as much to Hospital. I feel that the best care is not provided by one name or brand but when there is good effective communication and we know that it is going on."
EMBRACE MODERN TOOLS
Communicating the Case for Change in Novel Ways

...Then let's transform the consumer experience together.

https://vimeo.com/391291378
TRANSFORM EDUCATIONAL TOUCHPOINTS

Case Study: Emory Winship

A. Preparation for Initial Visit
   - Explain care team roles
   - What to bring to visit
   - Contact information

B. Set Expectations Early On
   - One page summary
   - Compare treatment options
   - Talking point during consult

C. Detailed Preparation for Side Effects
   - Detailed prep before surgery, at hospital, and at home

D. Robust Support Options
   - TrueNTH Decision Support and Symptom Tracker
   - Improved EMR message response

https://www.endeavormgmt.com/resource/improving-patient-enchantment
ABOUT US

Our Value
OUR FIT
Insights + Expertise = Practical Strategies

Industry Expertise

A team that includes those with prior healthcare leadership experience.

Deep understanding of the healthcare system environment, from the most complex (academic-community partnerships) to most competitive (regionally-based systems).

Trusted advisor to some of the most recognized healthcare systems in the country.

Research-Driven Insights

Use of proven research tools and frameworks for brand, experience, culture and operations management across industries.

A 50-year heritage of research innovation to drive strategic decision-making.

Best practices developed with national leaders in healthcare.

Practical Strategies

Clear and actionable recommendations using insight-driven scenario development to express multiple options.

Consensus-driven decision making processes to ensure the strategy is embraced.

Engagement processes to maximize the potential for advocacy of the strategy, both internally and externally.

We appreciate the unique needs of healthcare brands. With much more at stake in every single interaction, understanding decision factors and aligning your experience to it is paramount. Our approach is based on our extensive experience working with many national healthcare brands.
SCOPE OF SERVICES

Building a Customer-Oriented Experience

Experience Management

For over 20 years, we’ve been using our proven approach to organize insight development, strategy design, and experience monitoring. We assess key needs, touchpoints, and experience stewards throughout the continuum of the journey.

- Patient Experience Management
- Physician Experience Management
- Donor Experience Management
- Healthcare Employee Experience Management
- Touchpoint Assessment
- Persona Development

Experience Strategy & Design

We guide your experience design and planning efforts, with a focus on cross-organizational collaboration and experience consistency throughout the supply chain. Our digital insights dashboards provide integration and easy access for monitoring customer experiences.

- Cross-Functional Workshops
- Healthcare Growth Playbook
- Health Brand Strategy
- Digital Insights and Dashboards

Implementation Excellence

Our team members have executive-level experience and expertise in executing planning efforts, cultural transformation, and cross-functional collaboration. We translate your insight and planning efforts into action.

- Strategic Planning
- Financial Analysis
- Revenue Cycle Improvement
- Operational Excellence
- Organizational Transformation
- Quality and Patient Safety
- Executive Transition
- Destination Medicine

www.endeavormgmt.com/healthcare
ENDEAVOR ANALYTICS
Real-time Integration of Disparate Data

Take Big Data to Big Impact
Leveraging our history of over 60 years in marketing research, we have created technology-enabled tools to help capture voice of the market, customer and employee. Our Insights360 solution will allow you to place listening posts at high priority touchpoints providing you with a 360 degree view of your key stakeholders and influencers. Built on the Salesforce.com platform, you can integrate real-time feedback with operational data for reporting insight within the context of the business environment. In addition, you can incorporate CRM to monitor, track and respond to positive and negative feedback all within the same system. Finally, a single platform for capturing feedback, tracking customer service trends, responding/service recovery and measuring your relationship with your customers.

Armed with customer experience insights, Endeavor Analytics leads CRM design teams to develop systems that meet workflow and business reporting needs; all aimed to enhance the customer experience. This includes a careful examination of end-user needs, identification of operationally critical information, workflow enhancements and data schema. Our requirements documentation can be used for your own programming, with other vendors, or for quality control and training.

Take Big Data to Big Impact. Our Insights360 solution will take your program to the next level. Going beyond data integration, we work with you to establish a solid measurement program that is in alignment with your business goals and strategy.

We help you identify what data matters most, streamline the process of data integration, then create visually rich dashboards and data visualizations to help you socialize and share insights with your stakeholders.
We work with nationally-recognized Institutions:
• 4 “Honor Roll” institutions
• 8 out of the top 20 cancer programs
• 3 out of the top 4 pediatric hospitals
• 3 out of the top 10 cardiovascular programs

National Benchmarking Studies:
• Patient experience management
• Marketing practices
• Physician relations programs
• International programs

Ranked as one of top 50 Healthcare Consulting firms by Modern Healthcare

The Endeavor Difference:

Our collaborative, information-based approach instills confidence in results and brings into focus the true meaning of offering an exceptional customer experience.

We have been specializing in customer experience for over a decade. Our approach applies industry best practices and proven frameworks to real-world situations.

Our team members have depth and breadth of experience and knowledge; many have executive-level experience at leading healthcare organizations.