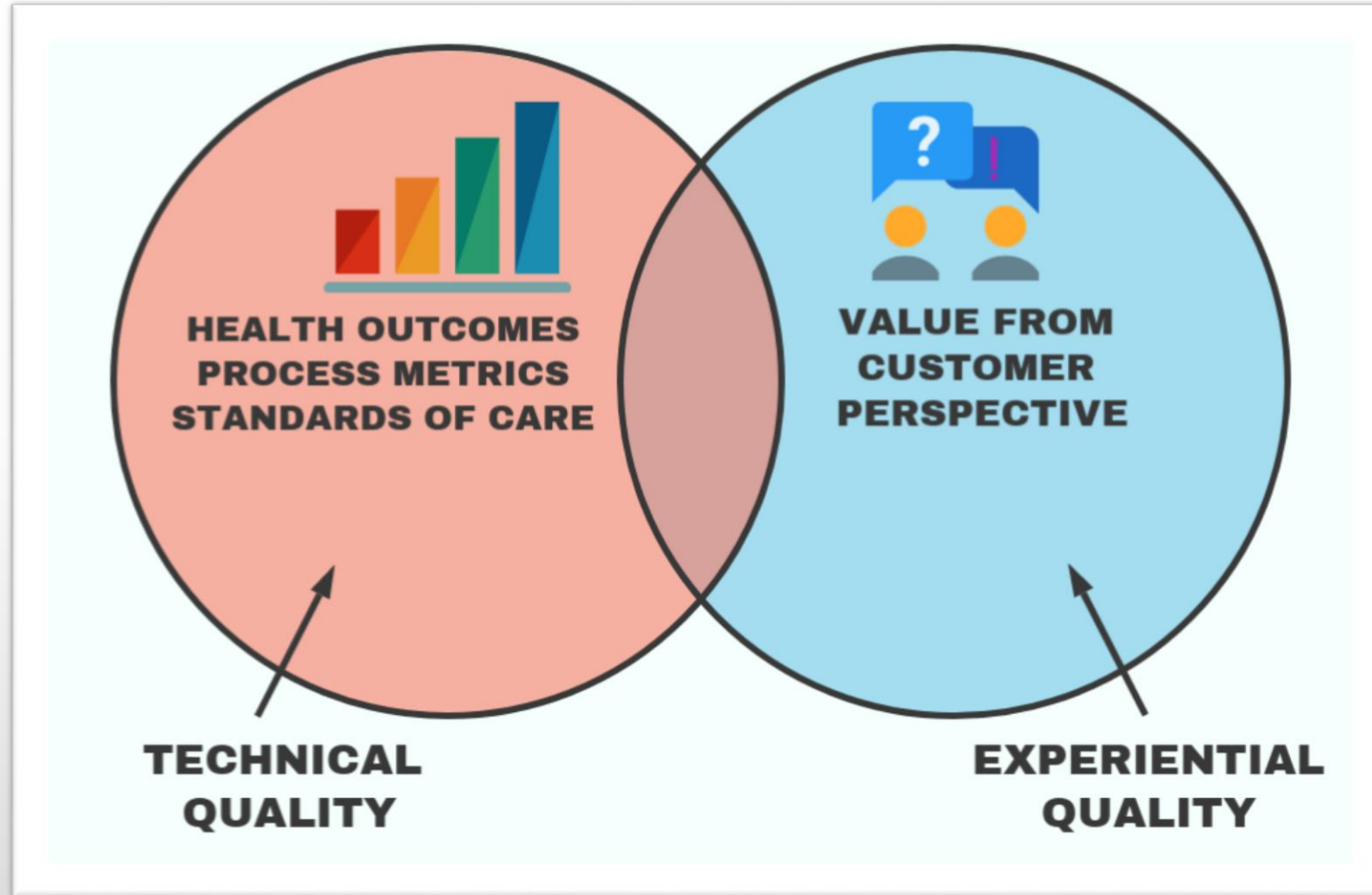


BREAK OUT: VOICE OF THE CUSTOMER

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DIMENSIONS OF QUALITY



RAISE YOUR HAND IF...

1. YOUR ORGANIZATION COLLECTS INPUT FROM CUSTOMERS?
2. YOU ANALYZE THAT INPUT TO SEE PATTERNS AND TRENDS?
3. YOU COLLECT QUANTITATIVE DATA TO CONFIRM OR REFUTE THERE IS A PROBLEM?
4. YOU USE WHAT YOU'VE LEARNED FROM 1. - 3. TO DO QI PROJECTS?



CUSTOMER PARTICIPATION CAN BE JUST AS VALUABLE MEASURES FROM YOUR EMR

- If you invest in training customers and soliciting their input about what can be improved; you need to **incorporate them and their ideas in a meaningful way!**
- customers should have more than a token seat at the table, don't expect customers just to rubberstamp leaderships improvement ideas.



THE MOMENT OF TRUTH...

WHAT IS THE MOMENT OF TRUTH FOR YOUR CUSTOMERS

- When they call you?
- When they first come in the door and sit in the waiting room?
- Interacting with the front desk?
- The service experience?



WHAT IS VOICE OF THE CUSTOMER?

It is the in-depth process of capturing customer's expectations, likes and dislikes. Using VOC is structured technique to capture a detailed set of what a populations wants and needs. Data can be collected in a variety of methods and is analyzed to understand how the systems, processes, and services provided influence the customer experience

- Customer feedback is arranged into a categorized structure (such as QFD or CTQ), and then ordered in terms of relative importance and satisfaction with the current state.
- VOC analysis should include both qualitative and quantitative data sets.
- They are generally conducted at the start of a process, or service design initiative – Plan in PDSA or Define in DMAIC.



VOICE OF THE CUSTOMER TECHNIQUES

- These techniques come from the world of Lean Manufacturing, and seek to get to the core of what “delights” our customer, so that we can build our processes and systems for them, not us as the service provider.
- Learn to look at the process through the eyes of customer, instead of from the service provider point of view
- Assess Value with the eyes of the customer
 - Value stream mapping – how much of our processes don’t add value to the customer; what are requirements.
 - What are their needs?
- Critical to quality – what are the customer expectations?
- How well are we satisfying their expectations? How can we go beyond expectations?



WHO ARE THE KEY CUSTOMERS?

- ***Who are they?***
 - Describe key populations in detail
 - Don't just guess – analyze demographic data, talk to them and get to know them!
- What do they need and want?
- How well are we doing delivering their current needs and wants?
- What are their future needs and wants?
- What can we do to **WOW** them?



WHAT DOES THE CUSTOMER CARE ABOUT?

- Service Specifications – what attributes and features do they need, how can we go above and beyond and satisfy their wants.
- Ease of access – when, where, how
- What does it cost – Not just \$, consider opportunity cost



WELCOME ALL CUSTOMER INPUT

- More than just comment boxes: implement regular surveys, focus groups and foster opportunities to make customers feel like VIPs connected your “inner circle”.
- Make sure a customer is on the team that reviews this qualitative data.
- Gather feedback that is timely and actionable, consider:
 - Concerns
 - Complaints
 - Questions
 - Suggestions
 - Ideas – What works well, what could work better, what is missing from your experience?



ROUTINELY COLLECT *QI SPECIFIC* FEEDBACK

- Get input that is directly pertinent to your QI projects
- Design a process that collects feedback quickly, and can respond quickly to customer needs
 - customer needs can change in an instant and change dramatically
 - Use the right sampling methodologies and minimizing the potential for survey fatigue, consider targeted surveys to key populations.
 - Ask the RIGHT questions, not the SAME OLD questions



CUSTOMER TOUCH POINTS

- When your customers (internal/external) comes in touch with your process what do they:
- See? (Initial reaction)
 - Feel?
 - Sense?
 - Hear?
 - Experience?



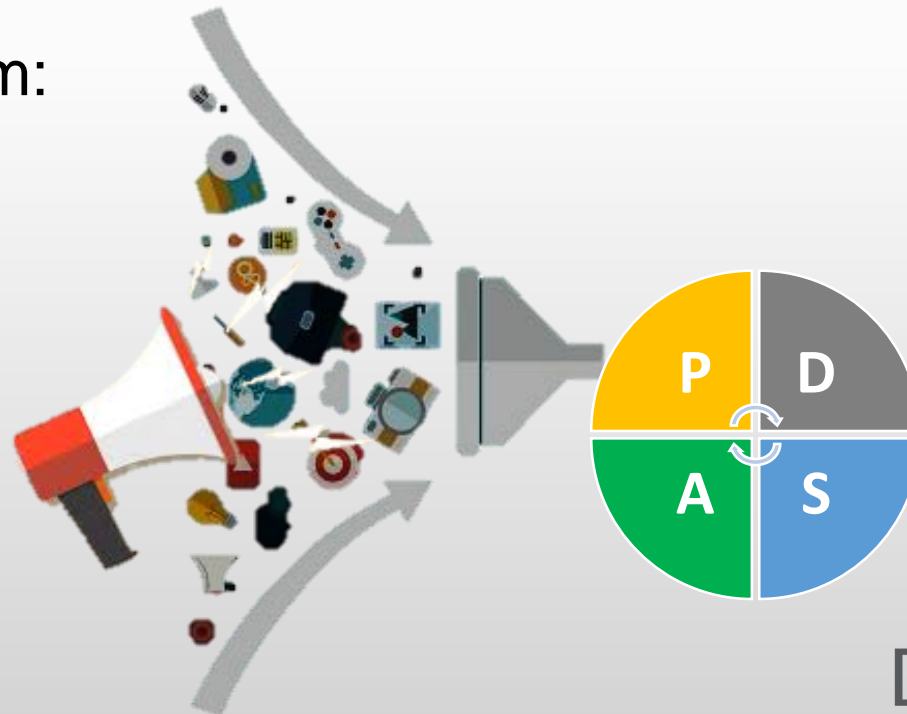
TECHNIQUES TO HEAR THE VOC

1. Customer Interviews
2. On-Site Customer Surveys
3. Off-site and Online Surveys
4. Live Chat
5. Focus Groups
6. Feedback Form



WHICH IS BEST FOR MY PROJECT?

- Ask them!!
- Use a mix: online polls, surveys, focus groups, special events, key-informant interviews etc.
- Make customers feel important by involving them in meetings. Incorporate them into improvement teams.
- Consider how to best reach them:
 - Where is the best setting?
 - How—internet vs. in-person?
 - What to ask?
 - Best time to do it?
 - How often to do it?



QI TOOLS TO ANALYZE VOC

- **Pain, Neutral, Delight**
- **Gemba Walk**
- **Secret Shopper**
- **Critical To Quality Trees**
- **Quality Function Deployment**



PAIN, NEUTRAL, DELIGHT

This technique is used to quickly separate aspects of service delivery into three categories:

- **Pain** – the feature detracts from the overall experience
- **Neutral** – the feature simply meets expectations
- **Delight** – provides value beyond expectations

Use process improvement tools to eliminate pain points and add delighters

- Once you've created a flowchart, show it to your CAB and have them mark each step as one of these three categories



CRITICAL TO QUALITY TREE

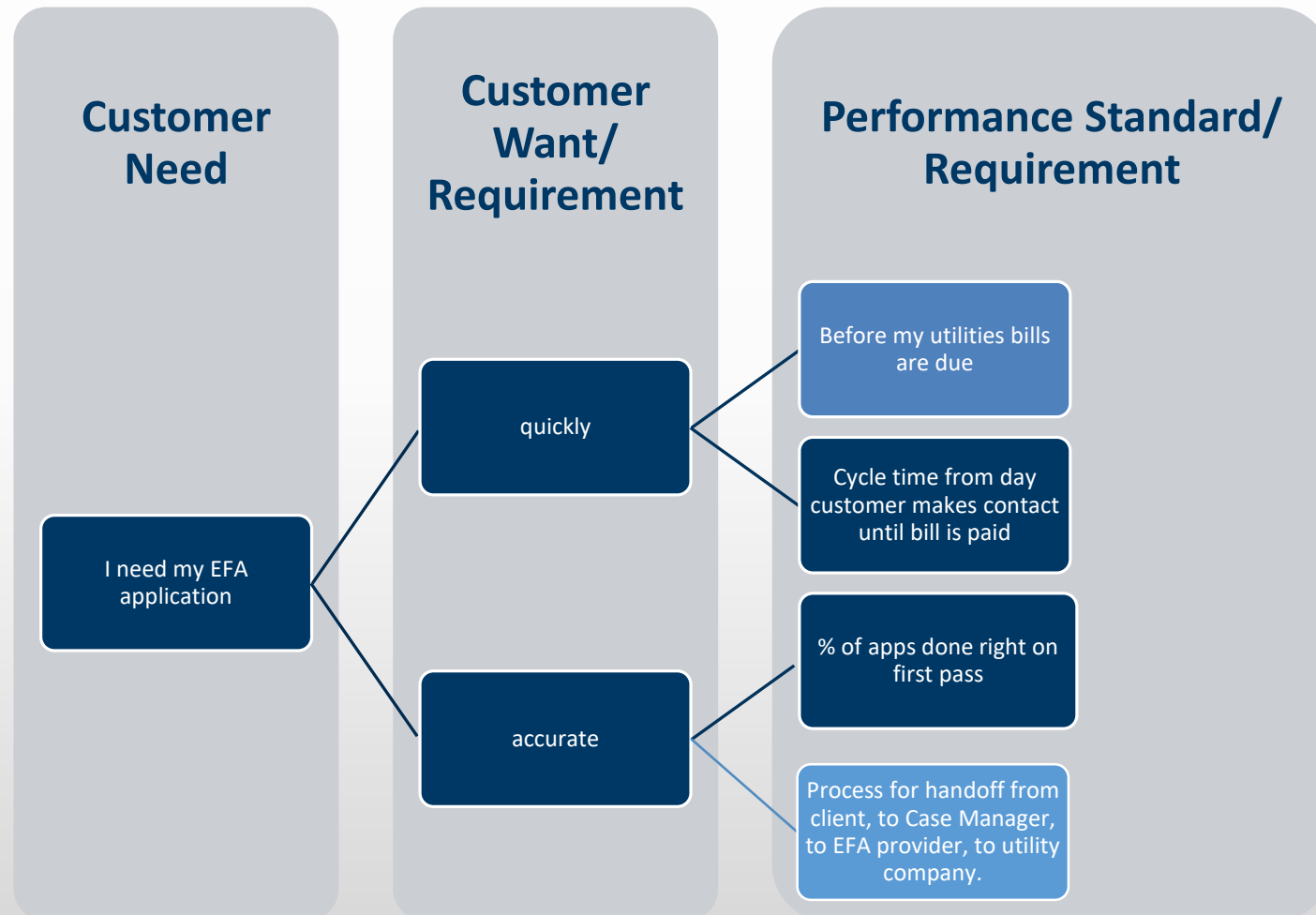
Critical-to-quality (CTQ) trees, also called drill-down trees, help translate broad customer needs into specific, actionable and measurable project metrics. Think of them as the customer counterpart to the driver diagram. This tool comes from Six Sigma, and is a valuable way to translate the VOC into actionable things.

- Key features of CTQ diagrams include:
 - Start with what customers identify as needs
 - Ask customers for drivers
 - Think about customer requirements
- Tips for creating a CTQ Tree:
 - Drill-down to one customer associated with that process, or service.
 - Identify what the customer needs and why they come for the service
 - Consider factors that lead to customer satisfaction above just meeting a need
 - Identify potential performance measures to ensure you are meeting customer needs



CTQ TREE EXAMPLE

UTILITY ASSISTANCE



AMPLIFY THE VOICE OF THE CUSTOMER USING QI

Customer Survey Results:	Need	Critical Requirements	Tools for follow-up
“I like the services I received, but I can’t wait all day for them.”	Quicker process for visits	Efficiency, Timeliness	Flow chart, value stream map, spaghetti map,
“That girl you got at the front desk is rude!”	Staff that is polite	Complaint Resolution, Training, Cultural competency	fishbone diagram, driver diagram, gemba walk, SIPOC diagram
“I want it to be easier to get the services I need—housing, insurance, and food bank”	Right services easily accessible to the right person	Accuracy, Efficiency	Flow Chart, value stream map, control chart
“I work and can never get appointments when I’m free.”	Visit slots that work around their schedule	Availability	5 Whys, Fishbone diagram, Value stream map, Driver Diagram

SHARE OUTCOMES WITH CUSTOMERS

- Close the feedback loop – let customers know the outcomes of their contributions and resulting changes
 - Have a process in place
 - Let them know that their peers are involved in the QI process and their concerns are taken seriously by folks that represent them
- Communicate to customers, staff, and stakeholders that all customer input receives the level of attention and response that it deserves.



Ready to try it out using an interactive scenario?

CASE STUDY



CASE STUDY INTRO

Your agency received a complaint. There is a list of things the customer is dissatisfied with, but the cause all seems to start with the phone system - the automated options aren't easy to navigate & they get transferred or put on hold, and don't get the information they need as quick as they need it.



WHAT DOES THE CUSTOMER NEED?

- A. Optimized automated telephone system
- B. Access to a live person 24/7
- C. Live chat on a website
- D. To get service somewhere else

ANSWER: A

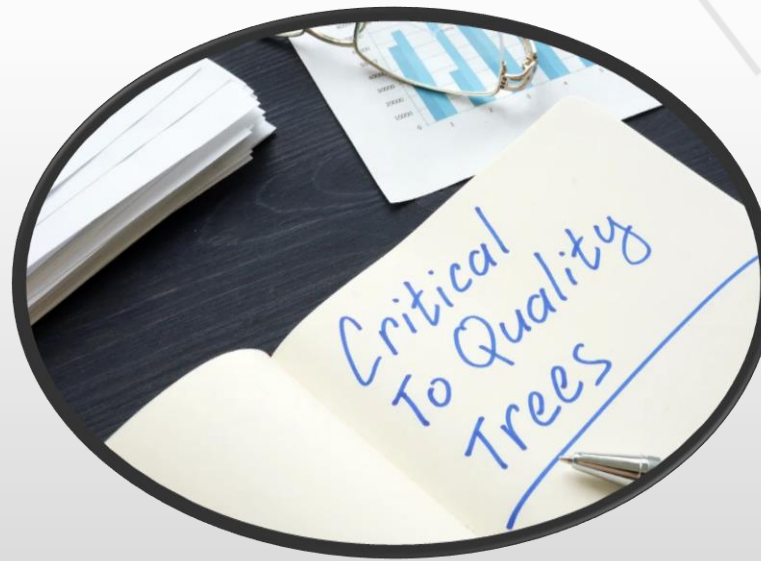


WHAT THE CUSTOMERS CRITICAL REQUIREMENTS?

Please choose all that apply!

- A. Timeliness
- B. Accuracy
- C. Cost
- D. Ease of Use

ANSWERS: A. & D.

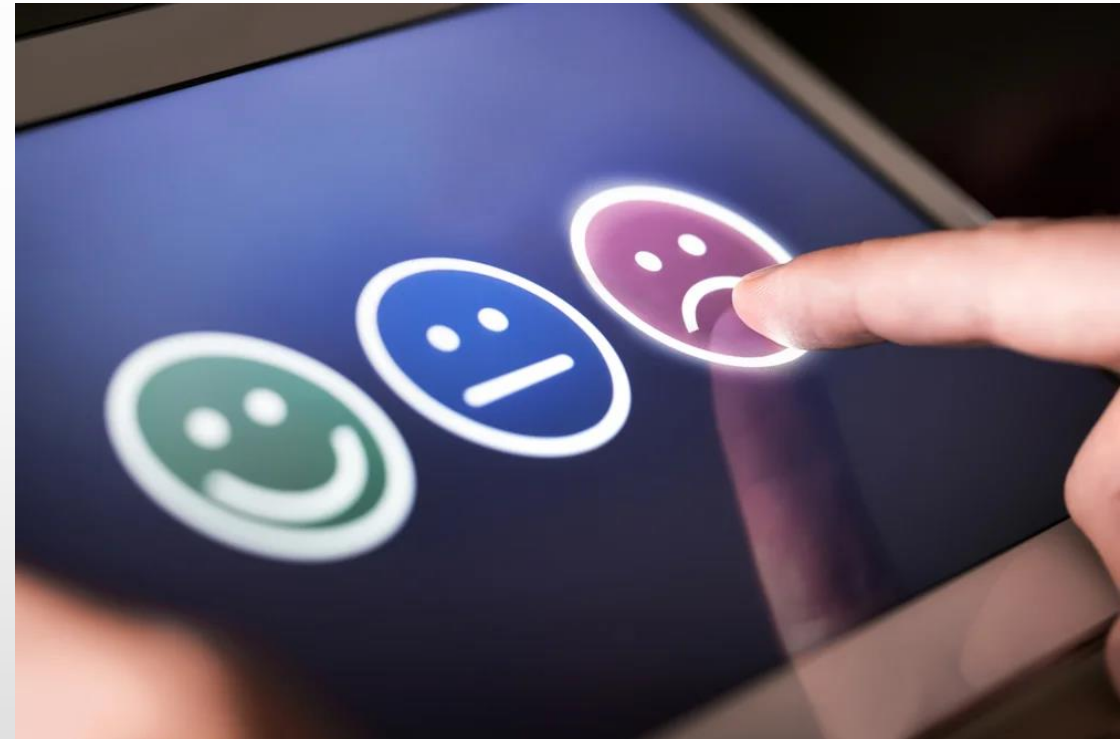


WHICH VOC TOOLS SHOULD YOU USE?

To collect more customer driven data about this problem

- A. Survey
- B. Focus Group
- C. Secret Shopper
- D. None – this customer is just being extra!

ANSWER: A & C



DATA FROM SURVEY & SECRET SHOPPER:

Your QI team adds a brief survey for every call received in the next two weeks. In addition you recruit four secret shoppers to call several times each day.



842 calls
received

185 surveys
done -- 74 had
negative
feedback

114 secret
shopper
observations

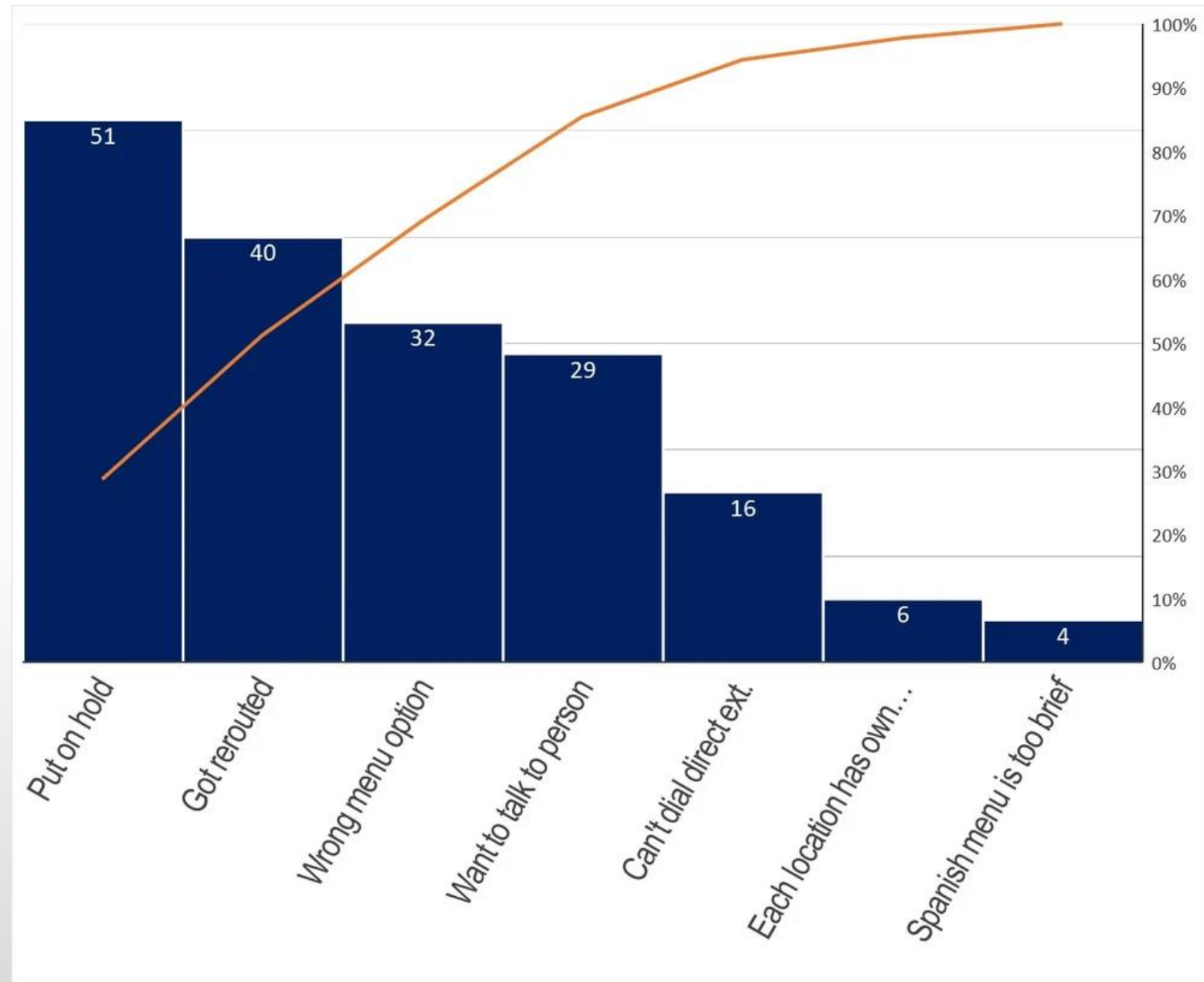


PARETO CHART

Where should the project focus first?

- A. Standardizing and clarifying menu options
- B. Having someone free to talk on the phones at all time
- C. Choosing a new phone system vendor
- D. Improving process to reduce holds and reroutes

ANSWER: D



WHICH IS NOT A GOOD PROJECT MEASURE?

- A. Retention HAB measure
- B. Reduce average time calls are on hold
- C. Decrease the % of misrouted calls in the phone system
- D. Customer Satisfaction with phone system

ANSWER: A



CHOOSING CHANGE IDEAS

How can you prioritize the voice of the customer to get their input and buy-in?

- A. Share them with the CAB
- B. Do a survey with a sample of customers who had concerns before
- C. Let all customers vote when come for services
- D. Put ideas in a newsletter and ask them to follow-up if have feedback

A. & B. - HIGH IMPACT WITH MINIMAL EFFORT

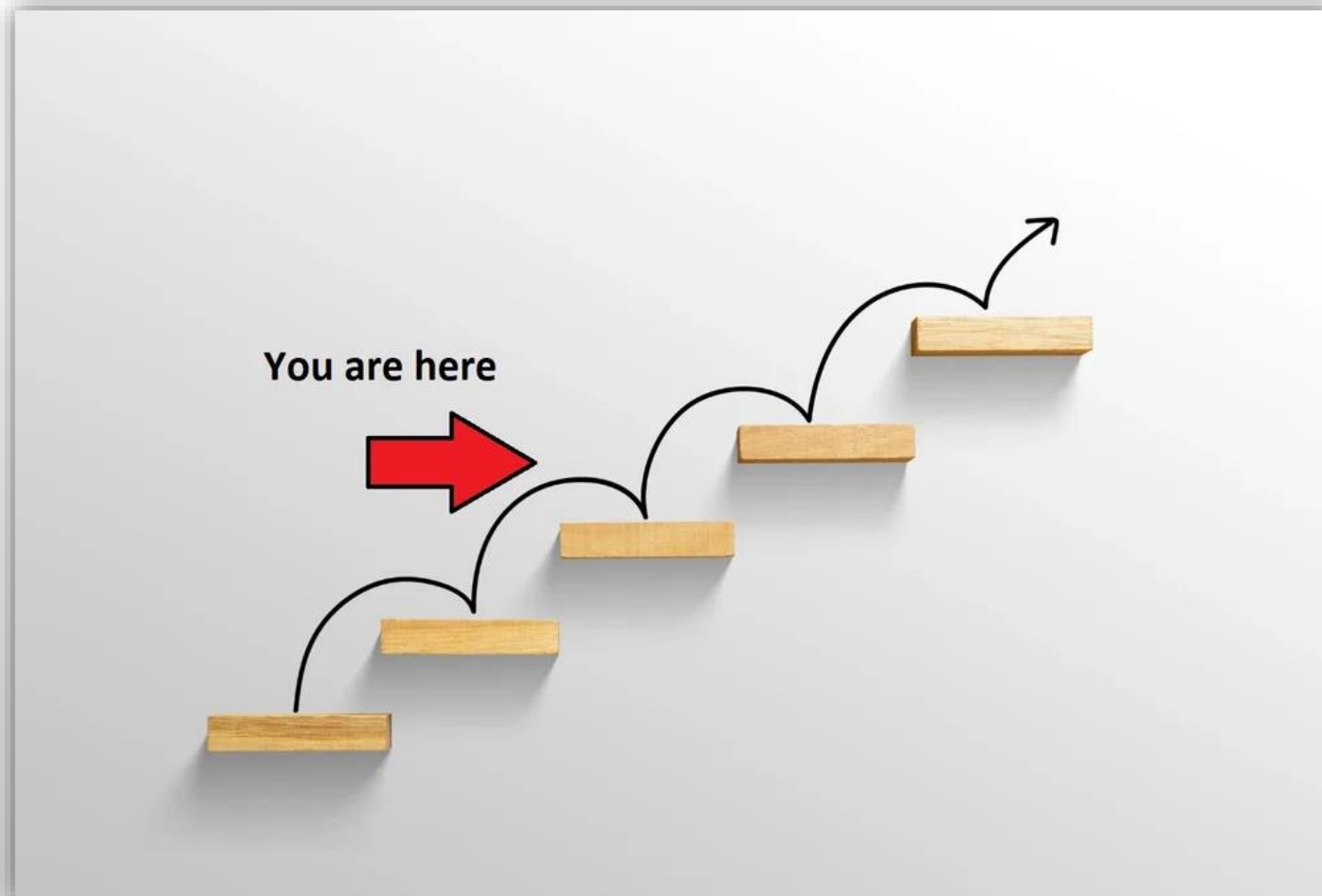


1. Expand menu options to a two-tier system (appointments or questions).
2. Add option to dial an extension to main menu.
3. Allow main menu options to cycle twice, rather than once



IMPROVEMENT CYCLE COMPLETE!

The customers like the improvements, and the data backs it up: 25% reduction in misrouted calls and 12% reduction in hold times...but there is still a ways to go to reach goals and raise satisfaction.



WHAT IS THE NEXT STEP?

Please choose all that apply!

- A. Conclude the project and celebrate success!
- B. Revisit the process and the flowchart
- C. Have customer do a journey map of their phone call
- D. Go back to the drawing board

ANSWERS: B. & C.



GREAT JOB!

Reviewing the process from staff and customer perspectives revealed a need to educate staff on the phone system and its capabilities, and then the automated system was standardized and goals were reached.



- **36% Reduction in misrouted calls**
- **Average wait time reduced :55 to :32**
- **Customer satisfaction increased from 70% to 82%**



BONUS ROUND

How do you close the loop with customers about this project?

- A. Feature it in the annual report
- B. Poster in the waiting room
- C. Create a project narrative video to share on your website
- D. Other - share with the group!

