We value your opinion. Please share your feedback.

Client Feedback Process

Kaizen Event

February 24-27, 2014
A formal policy was created with the involvement of the division’s QI Committee in January 2013, it has become apparent that the specific process of gathering client feedback across all of the division’s programs and services has not been fully addressed. As a result, it has become a challenge to adequately review the customer satisfaction process and make improvements.

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 feedback forms / mth</td>
<td>&gt; 128 feedback forms / mth</td>
</tr>
<tr>
<td>0 Client driven improvements</td>
<td>&gt; 5 Client drive QI projects / year</td>
</tr>
</tbody>
</table>
Potential Results

- Clients have the ability to provide feedback the way they want to provide feedback
  - On-line
  - Paper
  - Email
  - Mail
  - Text
  - Fax
  - Link on every webpage
  - Link on every staff’s email

- Consistent client experiences across all programs

- Gathering feedback is part of our daily responsibilities
  - Part of the restaurant packet
  - Part of client closure
  - While waiting for vouchers in WIC

- 128 feedbacks / mth – 1-2% of all client touch points

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 feedback forms / mth</td>
<td>&gt; 128 feedback forms / mth</td>
</tr>
<tr>
<td>0 Client driven improvements</td>
<td>&gt; 5 Client drive QI projects / year</td>
</tr>
</tbody>
</table>

© 2014 Continual Impact LLC
Our approach … kaizen

A group of methods for making work process improvement. Planned team event conducted in the workplace systemically uncovering waste in a work process and eliminate in rapid fashion.
What is Continual Quality Improvement?

Achieving sustainable performance beyond what is thought possible by unlocking the limitless capacity of an organization’s most valued resource – its people.

Through the identification of focused improvement areas, elimination of non-value added work through the use of improvement methods to diagnosis and solve problems, test solutions, measure results, learn, and install sustainable change.
Value Is

Anything that

a. the customer recognizes as valuable and is willing to pay for, AND

b. Changes the product or information, AND

c. Is done right the first time.

Waste Is

Anything that consumes resources without adding value.
Waste Presents Itself in Different Forms

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Moving</td>
</tr>
<tr>
<td>2.</td>
<td>Stopping</td>
</tr>
<tr>
<td>3.</td>
<td>Searching</td>
</tr>
<tr>
<td>4.</td>
<td>Inspecting</td>
</tr>
<tr>
<td>5.</td>
<td>Getting Ready</td>
</tr>
<tr>
<td>6.</td>
<td>Things Gone Wrong</td>
</tr>
<tr>
<td>7.</td>
<td>More Than Needed</td>
</tr>
<tr>
<td>8.</td>
<td>Not Needed</td>
</tr>
</tbody>
</table>
Day 1

- Focus the team
- Understand the current state
- Observe the process
- Identify & prioritize issues & wastes
Let Kaizen, improvement begin!
Our Goal

To: Increase the # of client feedback forms submitted across all CCPHD's programs & services
For: Clients, Q1, Public Health Mgs, All Staff
So that: Clients receive quality services
Clients know how to provide feedback
Clients are confident feedback is used
Staff use feedback to improve

Measures:
Client feedback forms received
Improvements identified thru feedback

57/128 0/5
What is Client Feedback?

- What is Client Feedback: (our Scope)
  - Satisfaction
  - Suggestions
  - Complaint
  - Specific to a program or interaction
  - General to a P.H. project
  - Not results or direct service
    (e.g. my dad is making me sick)
  - Email of thanks that provides
    the 'what' & 'why'
Focusing the Team

GROUND RULES

RECOGNIZE YOUR COMMUNICATION STYLE

EXPECT TO LEARN SOMETHING ABOUT YOURSELF & OTHERS

SPEAK CLEARLY AND USE PERSONAL EXAMPLES

PARTICIPATE ACTIVELY, HONESTLY & OPENLY

ENGAGE IN THE PROCESS BY LISTENING AS WELL AS SPEAKING

CONFIDENTIALITY

TAKE RESPONSIBILITY FOR YOURSELF AND WHAT YOU SAY.

Any Additions?

Value | Waste
--- | ---

MOVING
- Any movement of people, items or information.
- Move people, place or item
- Transport of less product, materials

STOPPING
- Any delay in value-adding activities.
- Moving items, products, materials
- Something stuck or still

SEARCHING
- Finding something or someone needed to do work.
- Material, people, information

INSPECTING
- Checking to ensure work has been done correctly.

GETTING READY
- Activity to prepare to do work.
- Set up, change over, training time

THINGS GONE WRONG
- Any expected outcome.
- Defect, output, product that does not meet standards, specifications, expectations

MORE THAN NEEDED
- Any input or activity beyond what is needed

NOT NEEDED
- Something not necessary to provide value to the customer.
- Step or task in process

Waste of Time
- Anything that does not add value to the output

Daily Newspaper - Day 1

- Focus the team
- Understand the current state
- Observe the process
- Identify & prioritize issues & wastes
Remember the koosh ball exercise?
• Focus
• Goal Measurement
• Teamwork
• Thinking out of the box
• Learnings
Capturing our current process
Client Touch Points

300-400 per day
Capturing our current process
Our Current Process
Client Feedback Process (Current)

**Request & Obtain client feedback**
- Program Staff:
  - Go to Page 1, Request & Obtain client feedback
  - Provide dropbox contents
- PH Business Manager:
  - Review feedback, Take action if needed
  - Send all feedback
- Admin Assistant:
  - Receive all feedback
  - Log feedback
  - File feedback
  - Print & Share log

**Logging Feedback**

**Review feedback**
- QI Committee Manager:
  - Review log, Identify potential improvement opportunities
  - Print & Share log
  - Review log & QI committee comments during Mgr meeting

**Initialze an improvement**

**Info/ Deliverables/ Job Aids/ Templates**
- Feedback forms
- Resolution form
- Excel log
- Resolution forms
- Feedback forms
- Pdfs of emails & other docs
- Feedback Log
- Feedback Log
- Feedback Log

**Systems**

**Work content Time**

**Elapsed Time**

Total time: mins

Date created 2/24/14

© 2014 Continual Impact LLC
Going to the gemba
Going to the gemba
Capturing Issues
Prioritizing Issues

Prioritize Issues: 2x2 Ranking Matrix

Severity of Issue / Impact on Problem vs. Issue Frequency

- High Severity / High Impact
- High Severity / Low Impact
- Low Severity / High Impact
- Low Severity / Low Impact

Participants are seen working on the matrix with sticky notes.
Day 2

- Overnight Thoughts
- Review prioritized issues
- Root cause issues
- Identify & Prioritize solutions
- Develop future state
- Establish job aids & materials
Capturing the event for future sharing
Getting to the root of issues
Prioritizing Solutions: 2x2 Ranking Matrix

- Redesign Survey
- Survey, modify form, IP, match survey, mon. mission
- Reinforce importance, representation, risk management
- Use offline CD, or form on form, e-sign, via paper
- Explain the purpose & benefits
- Survey link, business cards
- Email, submit for online

Impact on Eliminating Problem

Scale

Speed & Cost to Implement

© 2014 Continual Impact LLC
## Improvement Hypothesis

<table>
<thead>
<tr>
<th>Issue</th>
<th>Improvement</th>
<th>Expected Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form not accessible</td>
<td>Update website for easy access</td>
<td>Increased # of completed client feedback</td>
</tr>
<tr>
<td>Lack of understanding of the process (thereby gathering client feedback is not a priority)</td>
<td>Standardize the client feedback process (Create, test, train, and continually improve)</td>
<td>Staff process, role, and process expectations Increased # of completed client feedback</td>
</tr>
</tbody>
</table>
| Form is not easy to use                                                | Update form  
  • Use on-line survey form  
  • Add form to restaurant packet  
  • Add form link to email contact  
  • Establish office kiosk | Increased # of completed client feedback                                                                                       |
Designing the future process
Day 3

- Overnight Thoughts
- Finish future state process
- Establish plan to create job aids & materials
- Create job aids & materials
- Begin testing
- Leadership Check-in
+ 1 ▲
Our future process

1. Receive & Record Feedback  
2. Resolve Feedback
Our future process

3. Log Feedback  4. Data Reporting  5. Analysis
Validating our future process
Have we addressed our Issues?
Have we incorporated our Solutions?
Have we eliminated Wastes?
Developing job aids
Kaizen = Action
Testing the process
Gaining leadership feedback & support
Day 4

Overnight Thoughts

Validate/update job aids

Test MTL, Debrief, Learning

Close out - remaining items

Report Out
Creating new job aids
Developing our training plan

What are we trying to accomplish?

TO: train staff to know how to solicit input and respond to feedback using the process outlined in the client feedback policy

FOR: All Public Health Division staff members

SO THAT:
Staff see the big picture of the client feedback process, embrace the value of client feedback and understand their role in continual process improvement

We achieve the overall goal to increase the number of client feedback forms (from 5 to 128) submitted across all Clackamas County Public Health Division’s programs and services

CONDITIONS: (What requirements or limitations exist?)

Requirements:
- Regular follow-up
- Staff buy-in
- Full team engagement
- Management support
- Consider staff input

Limitations:
- Long-term sustainability
- Fear of change
- Responsibility falls on one individual
- Change in management
## Next steps / What to expect

<table>
<thead>
<tr>
<th>What</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Staff Introduction</td>
<td>March 12&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>Program Specific Training</td>
<td>March 12-20</td>
</tr>
<tr>
<td><strong>Go-Live - March 24th</strong></td>
<td></td>
</tr>
<tr>
<td>Begin reporting &amp; analyzing</td>
<td>April 3rd</td>
</tr>
</tbody>
</table>
Handing off to the Process Owner
Potential Results

- Clients have the ability to provide feedback the way they want to provide feedback
  - On-line
  - Paper
  - Email
  - Mail
  - Text
  - Fax
  - Link on every webpage
  - Link on every staff’s email

- Consistent client experiences across all programs

- Gathering feedback is part of our daily responsibilities
  - Part of the restaurant packet
  - Part of client closure
  - While waiting for vouchers in WIC

- 128 feedbacks / mth – 1-2% of all client touch points

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 feedback forms / mth</td>
<td>&gt; 128 feedback forms / mth</td>
</tr>
<tr>
<td>0 Client driven improvements</td>
<td>&gt; 5 Client drive QI projects / year</td>
</tr>
</tbody>
</table>