Customer Satisfaction in Public Health: An Important Part of Your Quality Journey

Welcome! Thank you for joining! Sound for the webinar will come through your computer speakers. Please feel free to submit your questions throughout the webinar through the chat feature. We will start momentarily.

October 20, 2015

Ty Kane – PHQIX Expert Panel Member
Laura Willingham – Human Services Planner, Dare County Department of Public Health
Karl Ensign – Senior Director of Planning and Evaluation, Association of State and Territorial Health Officials

Moderated by Laura Arena, PHQIX Communications Lead
Webinar Agenda

• What is customer satisfaction?
• Stories from the Field
• ASTHO Customer Satisfaction Toolkit
• Take the Next Step!
• Q&A
Objectives

• Define common terms and describe important activities related to customer satisfaction.
• Explore customer satisfaction through the lens of a local health department example.
• Review available resources such as the ASTHO customer satisfaction toolkit.
• Inspire you to invest in & take the "next step" to improving customer focus in your organization.
What is customer satisfaction?

- Ty Kane
- PHQIX Expert Panel Member
• “Does anyone have an example of an internal customer service survey that you have used to gather information from your staff teams?”
• “.. Have you created your own internal survey that you would be willing to share?”
• “Would anyone have an example of a survey you've used in your public health departments use to obtain information on stakeholder satisfaction?”
• “I would recommend that you look at the Astho guide: Measuring Customer Satisfaction- Nine Steps to success.”
Customer Satisfaction Defined

• **The customer** is anyone who receives the results of our work and makes a value judgment about services provided.

• **Satisfaction** is a happy or pleased feeling because of something that you did or something that happened to you.

• **Customer or client satisfaction** is the degree of satisfaction provided by a person or group receiving a service, as defined by that person or group.

Two Types of Customers

• **Internal Customer**: The recipient (person or department) within an organization of another person’s or department’s output (product, service or information).

• **External Customer**: A person or organization that receives a product, service or information but is not part of the organization supplying it.

Source: ASQ.org
Everyone is a customer.

- Each person involved in a work process is at one time a customer of someone and a supplier to someone else.

Source: Customer Satisfaction in Healthcare, Reisberg, 1996
PHAB 9.1.4 (Significance)

• Customer focus is a key part of an organization’s performance management system.

• It is essential to identify customers and stakeholders to evaluate the effectiveness and efficiency of the health department’s work.

• A health department also needs a process to capture and analyze customer feedback in order to address the expectations of various public health customers.

Source: PHAB Standards & Measures (V. 1.5)
Conducting Surveys

• What are Surveys?
• Why Conduct a Survey?
• When to Conduct a Survey
• How to Prepare a Survey
• How to Distribute a Survey
• How to Analyze and Compile the Results of a Survey?

Source: Community Toolbox, Community Assessment, Ch. 3 Assessing Community Needs & Resources, Sect. 13 Conducting Surveys
What are Surveys?

- A survey is a way of collecting information that you hope represents the views of the whole community or group in which you are interested.

- Three main methods
  - Case study
  - Sampled surveys
  - Census surveys
Why Conduct a Survey?

- Learn about behaviors, needs & opinions.
- Find out about attitudes & reactions.
- Measure client satisfaction.
- Add credibility to research.
When to Conduct a Survey

- When you need information quickly and efficiently.
- When you need statistically valid information about a large number of people.
- When you can't get the information you need through other means.
How to Prepare a Survey

• Decide on the purpose of the survey.
• Decide whom you will survey.
• Decide what method you will use to collect your survey data.
• Write your questions.
How to Distribute a Survey

• Direct mail
• Interviews & phone surveys
• Drop boxes
• Media distribution
• Convenience sampling
• Group administration
How to Analyze and Compile the Results

- Gather incoming surveys
- Review returned surveys
- Secure a larger return, if necessary
Guideposts for Customer Satisfaction

- Hierarchy of customer values
- Ten basic needs of customers
- Roadblocks to customer service
- Three steps to customer oriented service

Source: Customer Satisfaction in Healthcare, Reisberg, 1996
Hierarchy of Customer Values

• Basic
• Expected
• Desired
• Unexpected
The Ten Basic Needs of Customers

1. Customers need to feel in control.
2. Customers need to feel that their actions are directed towards their goals.
3. Customers like to feel good about themselves and want to interact with those who can help them accomplish this.
4. Customers want to be treated fairly and appropriately.
5. Customers want their suppliers to be friendly and warm, which engenders trust and confidence.
6. Customers want to know what is happening and why.
7. Customers want to feel safe and secure.
8. Customers like the approval of others.
9. Customers want to feel important, recognized, and appreciated.
10. Customers need a sense of belonging; they like to identify with organizations.
Roadblocks to Customer Service

- Poor quality products
- Flawed systems & procedures
- Inadequate equipment & supplies
- Over-worked or understaffed workforce
Three Steps to Customer Oriented Service

• Step 1: Get off to a good start
• Step 2: Build on a good start
• Step 3: Build on the relationships
• Laura Willingham
• Human Services Planner at the Dare County Department of Public Health in North Carolina
Selecting the Project

Why Customer and Community satisfaction?

- Gaps between desired and actual performance levels.
- Strategic connection
- Areas staff/clients think need improving (low staff resistance)
- Accreditation Support
- Feedback from clients/community could help direct us to other QI areas/projects
- Strong QI team with representation from various divisions
This project allowed us to meet at least 4 benchmarks related to local health dept. accreditation including:

- BM 27.1- The local health department shall have in place a process for assessing consumer and community satisfaction with its services.
- BM 27.2- The local health department shall use data from the consumer and community satisfaction assessment to make changes to improve its services.
- BM 27.3- The local health department shall employ a quality assurance and improvement process to assess the effectiveness of services and improve health outcomes.
- BM 30.8- The local health department hours of operation shall be based on documented community need.
What are we trying to accomplish?

- Better Feedback from our consumers and community.
- Better understand the needs of our consumers and community.
- Make improvements based on quality feedback to better meet the needs of our consumers and community.
- Improve our survey tools
- Improve our survey processes
- Improve our survey analyses and change implementation process
What are the overall goals of our project

• Collect and utilize feedback to make improvements to our department and services to better meet the needs of our consumers and community.

• Improve quality of care

• Assure we are meeting the needs of our consumers and community

• To continue to improve our department and services
Aim Statement

• We aim to improve our clinic consumer and community survey tools and data collection process (Phase 1) by August 2013, and develop a data analyses process and implementation of improvements based on quality feedback from our consumers and community (Phase 2) by January 2014. This is important because it will help us continually improve the services we provide to assure they meet the needs of our community.
## Measurable Outcomes

<table>
<thead>
<tr>
<th>Measure</th>
<th>Operational Definition</th>
<th>Baseline</th>
<th>Goal</th>
<th>Post data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff satisfaction with current surveys and processes</td>
<td>The opinion of clinic and HEO staff regarding satisfaction of the current process for collecting feedback from our patients and our community.</td>
<td>Patient: 28% of staff were satisfied with current process Community: 15% of staff were satisfied with current process</td>
<td>40%</td>
<td>87.5%</td>
</tr>
</tbody>
</table>
### Measurable Outcomes

<table>
<thead>
<tr>
<th>Measure</th>
<th>Operational Definition</th>
<th>Baseline</th>
<th>Goal</th>
<th>Post data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff familiarity with current surveys and processes</td>
<td>The opinion of clinic and HEO staff regarding familiarity of the current process for collecting feedback from our patients and our community.</td>
<td>60%</td>
<td>81.3%</td>
<td>75.1%</td>
</tr>
</tbody>
</table>
## Measurable Outcomes

<table>
<thead>
<tr>
<th>Measure</th>
<th>Operational Definition</th>
<th>Baseline</th>
<th>Goal</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase the number of consumer surveys completed</td>
<td>The number of physical Patient Input Surveys completed.</td>
<td>35</td>
<td>70</td>
<td>115</td>
</tr>
<tr>
<td>Increase the number of community surveys completed</td>
<td>The number of physical Community Input Surveys completed.</td>
<td>5</td>
<td>25</td>
<td>76</td>
</tr>
<tr>
<td>Increase the response rate of our community surveys</td>
<td>The number of Community Input Surveys completed compared to the number of surveys administered.</td>
<td>5%</td>
<td>50%</td>
<td>75%</td>
</tr>
</tbody>
</table>
### WASTE WALK Community Input Survey

Use the Waste Walk worksheet to identify wastes that you see.

<table>
<thead>
<tr>
<th>OBSERVED WASTE</th>
<th>IMPROVEMENT IDEA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey is not user friendly and these are unnecessary steps</td>
<td>Motion + Improve Survey</td>
</tr>
<tr>
<td>Overproduction of community surveys, infrastructure is completed</td>
<td>Improve distribution process to reduce costs</td>
</tr>
<tr>
<td>Tomatoes, distribution of target audience across region of survey</td>
<td>Summarize process / Change process to reduce waiting</td>
</tr>
<tr>
<td>Too many people in various tasks, no summary of results, no changes</td>
<td>Est. ownership of project, reduce test staff involved</td>
</tr>
<tr>
<td>Too many surveys / project moved too fast</td>
<td>Commute mailing process, improve</td>
</tr>
<tr>
<td>Too many surveys vs completed</td>
<td>Return back/quashed surveys</td>
</tr>
<tr>
<td>Too much searching for supplies,oks to small 3104, etc.</td>
<td>Replace and progress</td>
</tr>
<tr>
<td>Too many, tasks done, match, false moves</td>
<td>Est. Kaya &amp; responsibilities &amp; leadership match to 60 emp</td>
</tr>
</tbody>
</table>

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**THE 8 WASTES**

- **DEFECT**: Product or service that does not meet customer demand due to quality issues (include rework).
- **OVERPRODUCTION**: Make more than, different than, or broken than required.
- **WAITING**: Wait for equipment, supplies, people, test results, etc.
- **NONVALUE-ADDED PROCESSING**: Effect adds no value to product. The product is not from customer’s viewpoint.
- **INVENTORY**: Excess material inventory or too much inventory.
- **MOTION**: Supply in excess of single-piece flow.

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**Dare County Department of Public Health**

SERVING TO ASSURE HEALTHY PEOPLE AND HEALTHY COMMUNITIES
Gemba Walk

Community Input Surveys:

• There was a lot of people, materials, places, and waiting involved in the current process.
• There was no ownership of the process and task and positions do not match up.
• There was so much room for improvement and this was demonstrated in the return rate of 5%.
## Gemba Waste Walk Worksheet: Patient Survey

### Waste Walk

*Use the Waste Walk worksheet to identify wastes that you see.*

<table>
<thead>
<tr>
<th>Observed Waste</th>
<th>8 Wastes</th>
<th>Improvement Idea</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test surveys, inadequate survey tool</td>
<td>Overproduction</td>
<td>Revise survey, identify survey storage area.</td>
</tr>
<tr>
<td>Within 6 ft. giving out surveys, not back at the data</td>
<td>Waiting</td>
<td>Establish a process.</td>
</tr>
<tr>
<td>No value due to poor data collected</td>
<td>Non-value added</td>
<td>Improve process so changes made on surveys can be made.</td>
</tr>
<tr>
<td>Supplies in various locations staff have to walk to get</td>
<td>Processing</td>
<td>Help supplies readily available.</td>
</tr>
<tr>
<td>Outdated version of survey mixed in, surveys filed incorrectly</td>
<td>Transportation</td>
<td>Update survey &amp; only use new survey. All surveys stored together.</td>
</tr>
<tr>
<td>Supplies in various locations</td>
<td>Inventory</td>
<td>Establish duties &amp; responsibilities match task to right position.</td>
</tr>
<tr>
<td>No ownership, task don’t match position assigned</td>
<td>Waste</td>
<td></td>
</tr>
</tbody>
</table>

### The 8 Wastes

<table>
<thead>
<tr>
<th>8 Wastes</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>Products or services that do not meet customer demand due to quality issue (ex. wrong size)</td>
</tr>
<tr>
<td>Overproduction</td>
<td>Make more than, earlier than, or faster than required.</td>
</tr>
<tr>
<td>Waiting</td>
<td>Wait for equipment, supplies, people, test results, etc.</td>
</tr>
<tr>
<td>Non-value added processing</td>
<td>Efforts made no value to produce or reduce from customer's viewpoint.</td>
</tr>
<tr>
<td>Transportation</td>
<td>Excess material movement.</td>
</tr>
<tr>
<td>Inventory</td>
<td>Supply in excess of single-piece flow.</td>
</tr>
<tr>
<td>Motion</td>
<td>Any movement of people or machines that does not add value to product or service.</td>
</tr>
</tbody>
</table>
Patient Input Surveys:

• Surveys were completed at checkout after the appointment and patient is ready to leave.
• Patients are not putting a lot of effort into the surveys and therefore the feedback is not quality.
• No consistent process in place for staff
• No staff support
PDSA CYCLES

**Act**
- What changes are to be made?
- Adapt? Or Abandon?
- Next cycle?

**Plan**
- Objective of cycle
- Questions/predictions
- Plan to carry out the cycle (who, what, where, when)

**Study**
- Complete the analysis of data
- Compare data to predictions
- Summarize what was learned

**Do**
- Carry out the plan
- Document problems/unexpected observations
- Begin analysis of data
PDSA cycles: Consumer Survey

- 1\textsuperscript{st} PDSA Cycle 1 - Consumer Survey, Get Patient feedback on survey.
- 1\textsuperscript{st} PDSA Cycle 2 - Consumer Survey, Get Staff input on patient survey
- 1\textsuperscript{st} PDSA cycle 3 - Consumer survey, Patient Focus Groups with “new” consumer survey
- 1\textsuperscript{st} PDSA cycle 4 - Consumer survey, Staff Focus Groups on “new” Consumer Survey
PDSA cycles: Community Survey

• 2\textsuperscript{nd} PDSA cycle 1-Community Survey, Get community input on community surveys
• 2\textsuperscript{nd} PDSA cycle 2- Community survey, Get Staff input on “new” Community Survey
• 2\textsuperscript{nd} PDSA cycle 3-Community survey, Test “new” Community Survey with Community Focus Groups
• 2\textsuperscript{nd} PDSA cycle 4- Community survey, Test revised Community survey with final round of staff
**Patient Survey**

**Patient Input Survey**

Date: ________________________________

Type of Visit (Please Circle One): Physical Female Annual Immunization WIC Lab Maternity Well Child Other

As part of our effort to improve our services, we would like you to complete a brief survey about your experience in our clinic.

Please respond to the following statements by checking the boxes that best match your answers. Thank you.

1. The location of the clinic is convenient for me.
   - Agree
   - Disagree
   - Not Sure

2. I am satisfied with the time it takes to get an appointment.
   - Agree
   - Disagree
   - Not Sure

3. The hours of operation are convenient for me.
   - Agree
   - Disagree
   - Not Sure

4. The wait time for my visit today was appropriate.
   - Agree
   - Disagree
   - Not Sure

5. The professional who saw me today thoroughly explained the services I received.
   - Agree
   - Disagree
   - Not Sure

6. The office staff was pleasant to deal with.
   - Agree
   - Disagree
   - Not Sure

7. Overall, I am satisfied with my visit today.
   - Agree
   - Disagree
   - Not Sure

8. How did you hear about our services? (Please circle)
   - Family/friend
   - Doctor’s office
   - Health fair or other community event
   - Contacted by phone
   - Newspaper/TV/Other

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**Patient Satisfaction Survey**

Excellent service is our most important goal. Your responses are important to us and will help us improve our services. Thank you for taking our survey and sharing your ideas with us.

Date: ________________________________

Today I visited the Health Department in: Manteo Frisco Kill Devil Hills

Type of Visit: Physical Female Annual Immunization WIC Lab Maternity Well Child Diabetes/MNT Other

Please check (✓) how well you think we are doing in the following areas:

How satisfied were you with your visit today?

RATING TODAY’S VISIT

- Ability to get an appointment
- Hours the Health Department is open (8:30AM-5:00PM, M-F)
- Convenience of Health Department’s location
- Phone calls were returned promptly

WAITING

- Length of time in waiting room
- Length of time in examiner/ interview room

STAFF

- Helpful and courteous
- Listens to you
- Takes enough time with you
- Provides instruction you understand

FACILITY

- Cleanliness
- Ease of finding the Health Department
- Comfort and safety while waiting
- Would you recommend the health department to your family/friends?
  - Yes
  - No

Which Health Department location is most convenient? Manteo Kill Devil Hills Frisco

What do you like best about the Health Department?

What do you like least about the Health Department?

How did you hear about the Health Department?

Suggestions/Comments

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SERVING TO ASSURE HEALTHY PEOPLE AND HEALTHY COMMUNITIES
Dare County Department of Public Health

Community Survey

The Dare County Department of Public Health wants your ideas about how we can improve our services. Thank you for taking our survey. Your opinion matters!

Date: ____________

1. The Health Department is open from 8:00 A.M. to 5:00 P.M. How do you feel about the hours of operation?
   □ These hours are just right
   □ The Dare County Department of Public Health should be open earlier than 8:00 A.M.
   □ The Dare County Department of Public Health should close later than 5:00 P.M.
   □ These hours should be extended hours (after 5:00 P.M.) at least one day a week
   □ Not sure

2. How often do you visit or utilize services provided at the Dare County Department of Public Health (this includes services' clinics such as pediatrics, dental, prenatal, family planning, environmental health, health education, dental)?
   □ At least once a year
   □ At least every other year, or two years
   □ I have never used the Dare County Department of Public Health in over 2 or more years
   □ I have never used the Dare County Department of Public Health

3. When answering the question above, if you checked that you have not used the Dare County Department of Public Health in 2 or more years, or that you have never used the health department, please tell us why by selecting from the answers below (you may check more than one answer):
   □ I have not used the health department because I have another doctor
   □ I have used the health department before, but I was not happy about the services I received
   □ I have heard good things about the health department
   □ Other reason (Please list here): ______________________________________________________________________

4. What would be the most effective ways to provide information about Health Department services to you? Please circle all that apply.
   □ Newspaper
   □ Radio
   □ TV
   □ Website
   □ Facebook
   □ Printed letters
   □ Email
   □ Other: ______________________________________________________________________

5. What reasons would prevent you from using Health Department services?
   ______________________________________________________________________

6. What are some things that would make you more likely to visit the Health Department?
   ______________________________________________________________________

7. Comments:
   ______________________________________________________________________

Thank you for completing our survey. For more information, please contact the Dare County Department of Public Health at 252-475-5003 or visit www.darenc.com/health.

Serving to assure healthy people and healthy communities

Dare County
Department of
Public Health

PO Box 1000
109 Exeter Street
Manteo, NC 27954
Phone 252-475-5003
Fax 252-475-1141
**FIRST DAY**

**KICK-OFF:**
PD/GOALS

**REFRESHER TRAINING**

**DOCUMENT REALITY**

**ID THE WASTE**

**PLAN COUNTER MEASURES**

**DAYS 2, 3 OR 4**

**MAKE CHANGE**

**MAKE CHANGE**

**MAKE CHANGE**

**LAST DAY**

**MAKE THIS THE NEW STANDARD**

**SUMMARIZE AND CELEBRATE**

**EVENT SUMMARY/GOALS AND RESULTS**

**DO IT AGAIN!**
# Value Stream Mapping

## Patient Survey

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Work Area</th>
<th>Activities</th>
<th>Delays / Waits</th>
<th>Observed Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Exam room</td>
<td>Patient given survey in exam room</td>
<td>Y</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>&quot;</td>
<td>Staff gives instructions</td>
<td>Y</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>&quot;</td>
<td>Patient completes survey</td>
<td>Y</td>
<td>3 minutes</td>
</tr>
<tr>
<td>4</td>
<td>&quot;</td>
<td>Patient ask any questions or need for further instruction</td>
<td>Y</td>
<td>10 minutes</td>
</tr>
<tr>
<td>5</td>
<td>mailbox at checkout</td>
<td>Patients puts completed survey in mailbox</td>
<td>N</td>
<td>1 minute</td>
</tr>
<tr>
<td>6</td>
<td>Admin/office</td>
<td>Tally results</td>
<td>N</td>
<td>4 hours</td>
</tr>
<tr>
<td>7</td>
<td>Admin/office</td>
<td>Present results</td>
<td>Y</td>
<td>2 Weeks</td>
</tr>
</tbody>
</table>

**Notes:**
## Value Stream Mapping: Community Survey

### Value Stream Mapping Data Collection Form

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Work Area</th>
<th>Activities</th>
<th>Delays / Waits</th>
<th>Observed Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Admin/Office</td>
<td>Decide who to mail the survey too</td>
<td>Y</td>
<td>3 months</td>
</tr>
<tr>
<td>2</td>
<td>&quot;</td>
<td>Translate to Spanish and make copies</td>
<td>Y</td>
<td>1 month</td>
</tr>
<tr>
<td>3</td>
<td>&quot;</td>
<td>Address Envelopes</td>
<td>Y</td>
<td>1 week</td>
</tr>
<tr>
<td>4</td>
<td>&quot;</td>
<td>Prepare packages</td>
<td>Y</td>
<td>1 week</td>
</tr>
<tr>
<td>5</td>
<td>&quot;</td>
<td>acquire self address paid postage</td>
<td>Y</td>
<td>1 week</td>
</tr>
<tr>
<td>6</td>
<td>mail room</td>
<td>mail surveys</td>
<td>N</td>
<td>1 hour</td>
</tr>
<tr>
<td>7</td>
<td>Admin/offices</td>
<td>wait to get back surveys in mail</td>
<td>Y</td>
<td>2 months</td>
</tr>
<tr>
<td>8</td>
<td>&quot;</td>
<td>tally results</td>
<td>N</td>
<td>2 hours</td>
</tr>
<tr>
<td>9</td>
<td>&quot;</td>
<td>present results</td>
<td>Y</td>
<td>3 weeks</td>
</tr>
</tbody>
</table>

### Notes:

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SERVING TO ASSURE HEALTHY PEOPLE AND HEALTHY COMMUNITIES
Kaizen Event - Key Improvements

- Patient Satisfaction Survey
- Community Input Survey
- Patient Survey Process
- Community Survey Process
- Patient Survey toolkits
- Community Survey toolkits
- Consumer & Community Policy & Procedure
- Data analyzing and sharing process
- Process for Implementing changes from survey data
- Identifying Roles and Responsibilities
Sustainability Plan

- Established Roles & Responsibilities
- Document in Polices & Procedures
- Document in Job Descriptions
- Team supports initial year of project
- Team meetings 1x a year to review, update and tweak process
- Reminders are build into events calendar
Next Steps

• Cont. to conduct Community Surveys in August
• Cont. to conduct Patient Surveys in September & March every year
• Support the implementation of the project
• Document presentation of data at staff meetings
• Identify future QI projects from the data collected
• Document implementation of improvements
Lessons Learned
Patient Satisfaction Surveys

• Communication was key.
• All staff emails and huddles were vital.
• More “Stars” and reminders needed to be provided in toolkits.
• Toolkits really helped staff feel supported.
• HEO role was important to lighten load on clinic and make them feel supported department wide.
• Providing incentives to patients as a thank you was very well received.
Lessons Learned
Community Input Surveys

• Get surveys to school nurses earlier.
• Don’t rely on interoffice mail to school nurses at various school locations.
• Try to get a better idea of number of surveys needed—we underestimated.
• School nurses were asked to have all completed/returned surveys turned in to staff by a specific date.
Conclusion/ Suggestions

• Staff gained QI skills
• Team approach worked well
• Regular Staff Communication worked well
• QI culture has improved
• Staff feedback is all positive
• Needed processes were established
• Sustainability is key
• Karl Ensign

• Senior Director of Planning & Evaluation at the Association of State and Territorial Health Officials (ASTHO)
Who’s your Customer & are they Satisfied?
An ASTHO guide walks you through the process…

Karl Ensign, Senior Director of Planning & Evaluation
Association of State and Territorial Health Officials (ASTHO)

PHQIX Customer Satisfaction Webinar

October 20th, 2015
Support for Customer Satisfaction Tool & Capacity Building Assistance

- This project was supported by funds made available from the Centers for Disease Control and Prevention, Office for State, Tribal, Local and Territorial Support (CDC, OSTLTS)

- National Public Health Improvement Initiative (NPHII) funding

- The content of this presentation are those of the author and do not necessarily represent the official position of or endorsement by the Centers for Disease Control and Prevention
Accreditation Requirements

- “Health departments must provide two examples of how customer/stakeholder feedback was collected and analyzed from two different types of customers (e.g., vital statistics customers; food establishment operators; individuals receiving immunizations, screenings or other services; partners and contractors; elected officials, etc.)” [Standard 9.1.4A]
So what’s the first step?

1. Identify a validated tool and method and begin data collection *tomorrow*!

2. Take a breath and ask yourself what your organization wishes to learn & from whom.
### Step 1 – Identify Purpose

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Surveys</th>
</tr>
</thead>
</table>
| Monitoring customer satisfaction with services and activities at an overview level that can be applied to a range of activities. This enables states to compare performance across programs or aggregate program performance across programs or jurisdictions. It is sometimes done to fulfill reporting requirements. | Michigan’s Customer Survey Template  
Florida’s Customer Satisfaction Survey |
| Assessing specific programs using targeted prompts to facilitate making changes to specific program features. | New Jersey (Morris Regional Partnership), Retail Food Owner/Operator Satisfaction Survey  
Washington County, MN: Septic Survey  
Washington County, MN: Hazardous Waste |
| Monitoring and following up with specific customer complaints.          | See Step 6 on pages 6-8: Tracking and Following Up on Complaints |
| Asking stakeholders (including local health departments) to provide feedback on collaborative activities or state services. | New York’s Process for Obtaining Stakeholder Input  
Michigan’s Online Early Hearing Detection and Intervention Program Satisfaction Survey  
Michigan’s Online Public Health Dental Prevention Program Satisfaction Survey |
| Comparing feedback from client/stakeholder subgroups.                  | Michigan’s Customer Survey Template  
Michigan’s Online Early Hearing Detection and Intervention Program Satisfaction Survey |
| Comparing results over time.                                           | Select an appropriate survey and periodically administer it to track performance.             |

Being clear about the “whys” before you create the survey will help you determine the questions you ask.
2. Florida's Customer Satisfaction Survey

Customer Satisfaction Survey Tool

Location: ----------------------------------------
Program: ----------------------------------------

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neither Agree nor Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I got the information or service that I needed. (Accessibility)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The service or information was clear and understandable. (Clarity)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The staff was friendly and polite. (Courtesy)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The staff was well informed. (Knowledge)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The staff was helpful. (Helpfulness)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I was served in a timely manner. (Timeliness)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Overall: How would you rate your satisfaction with the information or services you received?

<table>
<thead>
<tr>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Neither Satisfied nor Dissatisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additional Comments: ________________________________
Michigan’s Customer Survey Template

we thank you in advance for your valuable feedback.

Instructions for Completing the Survey

For each question please select the answer that best represents your response. When you are finished completing the survey, please return your survey to one of the drop boxes located at each reception area within the health department.

Please tell us about your experience with the Local Health Department Name.

1. During your most recent visit with the Local Health Department Name, what program(s)/service(s) did you receive? (please check all that apply)

   - Dental Health Visit
   - Women, Infants, and Children (WIC)
   - Child or Adolescent Immunization
   - Adult Immunization
   - Travel Immunization/Clinic
   - Well Child/Adolescent Visit
   - Family Planning Services
   - Breast and Cervical Cancer Control Program (BCCCP) Services

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Step 2 – Select Programs & Customers

- **Program (King County, WA criteria):**
  - Largest number people served
  - Clear opportunities to improve
  - High strategic priority
  - Large program (staff, budget)
  - High profile, known/potential controversy

- **Keep in mind that your target customer determines:**
  - **Type of survey**
  - **Sample size**
  - **Questions asked**
  - **How they are asked**…
Step 3: Determine How Results Will Be Used

Once you have narrowed your survey’s focus, think strategically about exactly how you would like to use the information you gather. Are you looking for general information for public reporting or more specific and concrete information to modify programs? Are you looking for information specific enough to use in staff reviews or information to maintain or strengthen relationships with community stakeholders? Common uses of customer satisfaction data include:

- Public reporting in annual reports, performance reports, websites, and newsletters to stakeholders, partners, and customers.
- Internal reporting to program staff, management, and organizational partners.
- Strategic and business planning analyses and documents.
- Information for grant applications.
- Posting survey results in office waiting areas and linking the results to a specific change the clinic has made. One state reports posting signs in its WIC offices with the heading “You Told Us and We Listened” noting changes made as a result of customer feedback.
Step 4 – Determine Budget & Plan Within It

- **Survey administration**
  - Telephone: High
  - Mail
  - In-office/Paper
  - E-mail/Web-based: Low

- **Sample size**

- **Data collected**
  - Open-ended: High
  - Close-ended: Low

- **Analysis**
Step 5 – Identify People to Include in Survey Planning & Implementation

- Customers
- End users of analysis
- Technical experts
  - Administering survey
  - Survey design
  - Analysis
Helpful Tips for Survey Design

- Make surveys short
- Make questions clear with appropriate literacy
- Avoid double-barreled questions
- Use conventional language
- Make questions easy to answer
- Survey customers ASAP
- Keep questions standard over time
- Target questions on key factors
### Step 7 – Select Survey Method

#### Comparison of Survey Administrative Methods

<table>
<thead>
<tr>
<th></th>
<th>MAIL SURVEYS</th>
<th>E-MAIL OR WEB-BASED SURVEYS</th>
<th>TELEPHONE SURVEYS</th>
<th>IN-OFFICE PAPER SURVEYS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response rate</td>
<td>Low</td>
<td>Moderate</td>
<td>High</td>
<td>Moderate</td>
</tr>
<tr>
<td>Speed</td>
<td>Slow</td>
<td>Very fast</td>
<td>Fast</td>
<td>Very fast</td>
</tr>
<tr>
<td>Cost per completed survey</td>
<td>Low</td>
<td>Lowest</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>Anonymity</td>
<td>High</td>
<td>Questionable</td>
<td>None</td>
<td>Questionable</td>
</tr>
<tr>
<td>Ability to clarify survey questions and responses</td>
<td>None</td>
<td>None</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>Administrative bias</td>
<td>Limited</td>
<td>Sample bias</td>
<td>Interview bias</td>
<td>Sample bias</td>
</tr>
</tbody>
</table>
Step 8 – Pilot the Survey

Step 9 – Analyze the Data, Report & Follow-up
To Access the Guide...

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571.527.3143