



*Imagine better health.<sup>SM</sup>*

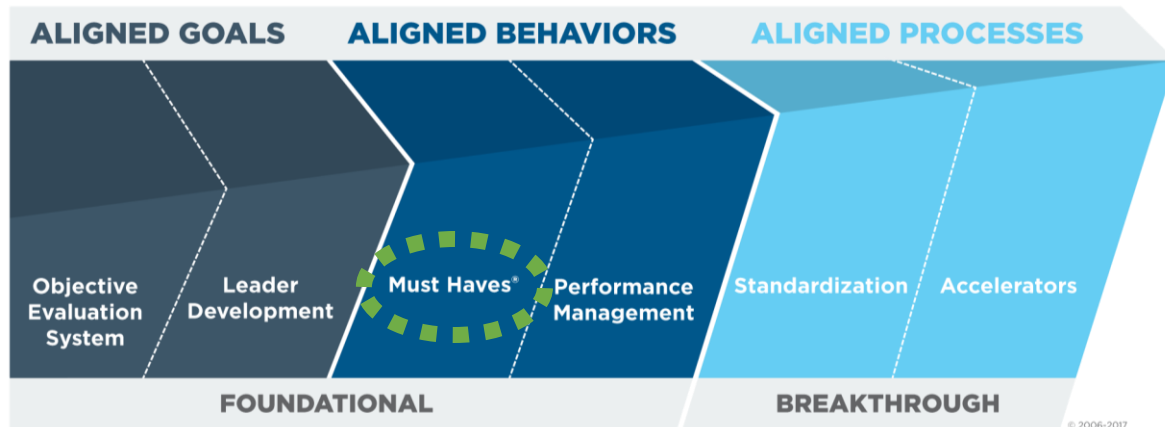
***Rounding for Outcomes:  
Leader Rounding with Internal Customers  
October 2017***

# Objectives

- Understand “WHY” Internal Customer Rounding is Important
- To become comfortable and successful with Rounding with Internal Customers
- How – To learn what is Best Practice
  - Utilization of your AIDET Plus the Promise<sup>SM</sup>
  - Establish Rounding Expectations
- Who – Establishing Rounding Plan for your Key Customers
- To practice, practice, practice conversations to become familiar with techniques learned

# EVIDENCE-BASED LEADERSHIP<sup>SM</sup> FRAMEWORK

## THREE ELEMENTS TO ACHIEVING OUTCOMES: ALIGNED GOALS, BEHAVIORS AND PROCESSES



### LEADER EVALUATION

Implement an organization-wide leadership evaluation system to hardwire objective accountability

### LEADER DEVELOPMENT

Create process to assist Leaders in developing skills and leadership competencies necessary to attain desired results

### MUST HAVES<sup>®</sup>

- Rounding
- Thank You Notes
- Employee Selection
- Pre and Post Phone Calls
- Key Words at Key Times

### PERFORMANCE GAP

Re-recruit high and middle performers, Move low performers up or out

### STANDARDIZATION

Agendas by pillar, peer interviewing, 30/90 day sessions, pillar goals

### ACCELERATORS

- Leader Evaluation Manager<sup>®</sup>
- Validation Matrix<sup>™</sup>
- Provider Feedback System<sup>™</sup>
- MyRounding<sup>®</sup>
- Patient Call Manager<sup>™</sup>

# Must Haves<sup>®</sup>

- Aligning Leader Evaluations with Desired Outcomes
- Employee Thank You Notes
- Employee Selection and the First 90 Days
- Pre and Post Phone Calls
- Key Words at Key Times
- **Rounding for Outcomes**

# What is Rounding for Outcomes?

*Proactively*, engaging, listening to, communicating with, building relationships with and supporting your most important customers and each other:

- Team Members
- Other departments
- Physicians
- Patients and Families

# Types of Rounding

- Senior Leader Rounding
- Rounding with Team Members
- Rounding with Patients
- Rounding with Physicians
- *Rounding with Internal Customers*

# Rounding with Internal Customers

## **WHY?**

- **CHI Mission:** The Mission of CHI St. Vincent and Catholic Health Initiatives is to nurture the healing ministry of the Church, supported by education and research. Fidelity to the Gospel urges us to emphasize human dignity and social justice as we create healthier communities.
- Understand the customer's point of view:
  - Identify ways to enhance and improve service
  - Build relationships
  - Reduce barriers
  - Enhance communication

# WHY

## *4 reasons why Internal Customer Rounding is important.*

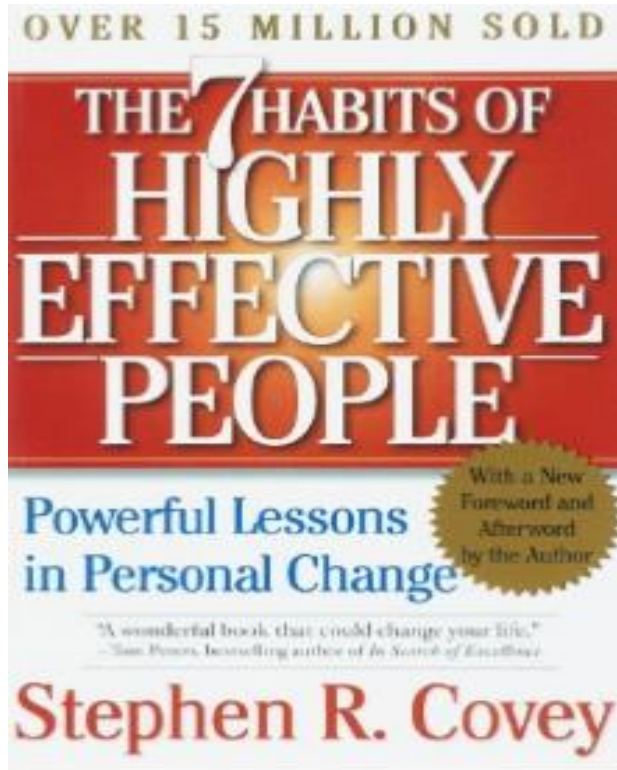
- 1. Proactive activity that allows leaders to:**
  - Evaluate performance and engagement
  - Harvest reward and recognition
  - Identify trends and opportunities
- 2. Support / Ancillary play vital role in care delivery to patients**
- 3. Improve lines of communication between departments**
- 4. Facilitates removal of barriers**

# Internal Customer Rounding

Leaders rounding with leaders in departments have as their goal:

- Achieving operation excellence
- Seeking ways to enhance and improve service
- Building relationships and reducing barriers
- Enhancing communication
- Understanding their customers point of view and what their needs are

# It's All About Relationships...



## The **7** HABITS Of Highly Effective People

- 1 Be Proactive
- 2 Begin With The End In Mind
- 3 Put First Things First
- 4 Think Win-Win
- 5 Seek First To Understand, Then To Be Understood
- 6 Synergize
- 7 Sharpen The Saw

# Rounding with Internal Customers

## *THE HOW?*

Develop a plan

- What departments do you have the most interaction with?
- Prioritize these areas:
  - High Volume
  - High Visibility
  - Highly Depend on each other to perform at a high level

# Parameters: Rounding with Internal Customers

## Based on results:

- Identify areas you support that are high volume, visibility and / or risk-typically - 5 or 6 departments
- Round in these areas weekly: 15 minute/round in each department will require approximately 1 hour / week dedicated by the support department leader
- Rotate the others so you connect with all departments served on a regular basis or as needed
- Define which individual(s) you will include in your rounds
- Validate areas of focus

# Rounding with Internal Customers

- Meet with the leaders (in their department) to share with them that they are a very important customer. What do you need to do to improve service?
- Review results, what has been accomplished and what still needs attention
- Provide timelines for issues to be resolved and work to get done

# Rounding for Outcomes

## *Keep in Mind*

- Define the plan (Who, What, When)
- Build the bridge you'd like others to cross
- Anticipate issues/ be open to new issues
- Don't get defensive
- Document outcomes
- No "slow nos"
- Recognition / Problem solving - 3:1 ratio

# A Word About Service Recovery

- NO EXCUSES
- OWN IT
- “I’m sorry you have had that experience. What I can I do right now to make this right?”
- Communicate when issue will be resolved or when you will provide an update.

# Internal Customer Rounding-After Initial Round

- Follow-up to assure gains are sustained
- To receive feedback for high performing Team Members

# Tools for Rounding with Internal Customers

- MyRounding® Template
- Preference Card
- Stop Light Report

# Structured rounding is critical (templated in MyRounding®)

## LRIC5: ROUNDING LOG

Date: \_\_\_\_\_ Unit rounded on: \_\_\_\_\_ Manager Name: \_\_\_\_\_

Baseline Rating on Internal Customer Survey: \_\_\_\_\_ Current Rating on Internal Customer Survey: \_\_\_\_\_

AREAS OF FOCUS:		
STEPS	KEY WORDS AND GUIDE	ACTIONS/COMMENTS
<b>AIDET®:</b>  <b>Acknowledge, Introduce, Duration, Explanation ("Why" behind rounding), and Thank you</b>	<i>A: Acknowledge, eye contact and say hello....                      I: My name is &lt;xxx&gt; and I have worked in &lt;dept&gt; for &lt;x&gt; years...                      D: I will be rounding on you &lt;state frequency&gt; and wanted to spend about &lt;amount of time (30 minutes for introductory round; 10-15 for subsequent rounds)&gt; with you today....                      E: Our goal is to provide excellent service to you and will discuss specifically how to best help you serve our patients ...                      T: Thank you for your time today...</i>	
<b>Accomplishments: Review what has been accomplished</b>	<i>Ex: "Since &lt;date&gt;, when I rounded with you last, I want to highlight the following items/systems put into place based on feedback..."</i>	
<b>Collect Wins: What is my department doing well?</b>	<i>Ex: "What is our department doing well?"</i>	
<b>Harvest Recognition: Who from my dept. has impressed you lately? Why?</b>	<i>Ex: "Is there anyone specific I can recognize for doing great work? What have they done?"</i>	
<b>Service Level Expectations</b>	<i>Ex: "When we reviewed our support services survey feedback, we noticed..." "Can you tell me how we can provide better service in that area?"</i>	
<b>Opportunities: What can my department do better? Any ideas on how we can improve?</b>	<i>Ex: "What is one thing you would like us to address right now? OR "What 1-2 things can my department do better? Any ideas on how we can improve?" (provide timeline)</i>	
<b>Is there anything I can help you with?</b>	<i>Ex: "Is there any other questions you have or anything else I can help with right now?"</i>	
<b>Follow-up: Establish next rounding date and document the round</b>	<i>Ex: "I will be back &lt;date&gt; to talk again. If there is anything we can do before that time..."</i>	
<b>Appreciation and Thanks</b>	<i>Ex: "Thank you for your time ..."</i>	

# Preference Card

## Clarify Expectations

- Most important?
- Must improve?
- Success = ?
- Frequency?

### LRIC7: INTERNAL PARTNER PREFERENCE CARD

Department: _____	Date: _____
Customer Names: _____	
<i>What three things can we do to ensure that we meet your expectations in providing excellent/very good service to you and your department?</i>	
1. _____	
2. _____	
3. _____	
<i>What is one item you would like to have improved?</i>	
_____	
<i>To be successful, these are the things we need from you and your team:</i>	
1. _____	
2. _____	
3. _____	
Date of next Rounding: _____	
Date of Update of Preference Card: _____	

## LRIC6: STOPLIGHT REPORT

*Note: The Stop Light Report is a way to communicate in writing how the ideas/concerns harvested in rounding are dealt with.*

*It is excellent to place on communication boards and to use during your rounds. Green Light items are things that have been addressed and are complete.*

*Yellow Light items are things in progress. Red Light items are those issues or ideas that cannot be done with the reason why.*

Department/Unit	Supported by:	Date:

# Stoplight Report

- Green: Complete
- Yellow: Work in Progress
- Red: Can't Complete At This Time and Here's Why

[illegible]

# HARDWIRED Rounding

*90% of leaders rounding with the prescribed frequency, utilizing good skills, to elicit actionable reward and recognition and process improvements that are documented and followed up on. These are trended and reported to give a more global organizational perspective.*

# Hardwiring

*“It isn’t hard to be good  
from time to time, what’s  
tough is being good every  
day.”*

*Willie Mays*

