An Experience Management Guidebook
Tools for Healthcare Leaders

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Endeavor

Overview

Customer service, patient satisfaction, experience and journey mapping – all of these are popular buzzwords as providing patients with an exceptional experience is more important than ever. With hospitals pouring more and more resources into providing a better experience, it can be hard to wade through all the terms and determine appropriate usage. In this white paper, we provide a guide to common buzzwords and when to use them as a catalyst for experience improvement.

Part 1: The Basics

Situational and Tactical

Customer Service – Customer service is about tactical assistance, such as helping a patient-family answer a specific question or meet a particular need. Although customer service refers to only a specific part of the experience, the sum of these interactions makes up much of how patients feel about their experience. And when patients complain, it is frequently related to customer service issues. A common example of customer service in the contact center. **Read our latest presentation** about best practices for healthcare contact centers.

Customer Satisfaction – A commonly used phrase, customer satisfaction is often included in objectives/goals, and measured by data through post-care surveys. It is a common key performance indicator (KPI) to track how well needs are being met. Customer satisfaction data is particularly helpful for providing a snap-shot of changes and trends over time. However, it is often times not enough to only use customer satisfaction data, as it can lack depth and detail to understand the *why* behind how customers rate their satisfaction, and how it fits into their holistic experience. In addition, most customer satisfaction surveys gather input well after the interaction being measured (such as post-discharge) so initial interactions are likely overshadowed by more recent experiences.

Holistic and Strategic

Customer Experience Management - Experience management represents a broader, holistic view of the customer's journey – from their first interaction (online, or perhaps the contact center) to their last (often times, the bill). It accounts for an omni-channel experience with a variety of touchpoints and experience stewards. Going beyond a single interaction, it represents proactively managing the entire customer journey so the band promise aligns with the experience. This often requires a collaboration among marketing, operations, and clinical front line. Providing an exceptional customer experience requires a solid strategy as a foundation.

Who is Who?

Consumerism is a hot buzzword in healthcare today; why should we care about consumers and how do they impact us? *Consumer* is the broadest term to describe anyone who makes purchases or uses services - so in short, everyone is a consumer. Ever-increasing service expectations and digital tools across industries means that today's consumers are not just comparing hospitals to other hospitals – they developing expectations based on their experiences outside of healthcare and are comparing these experiences when they come to the hospital.

In contrast, a *customer* is someone with whom you have interactions or a relationship and who has a choice of where to go. Customers can be patients, but also families or those in the decision-making phase of their journey who interact through conducting research, scheduling appointments, etc.

Finally, most narrow is a *patient* – someone who has already made a commitment to choose the organization, thus doesn't inherently have a choice.

Part 2: Tools and Techniques

**So Many Maps: What's the Difference?**

Experience mapping and journey mapping are terms that are often used interchangeably, and there are many similarities. Both are tools used to uncover the holistic experiences of customers as they move through chronological stages in their experience. However, a **journey map** is narrower in focus, zeroing in on a specific product or service. It is most useful when examining a very targeted segment or even a specific patient-customer, and only one type of product or service. For example, an appropriate scope for a journey map would be a hospital that wants to understand a newly diagnosed cancer patient's experience with radiology, but not explore the patients' experiences outside of that.
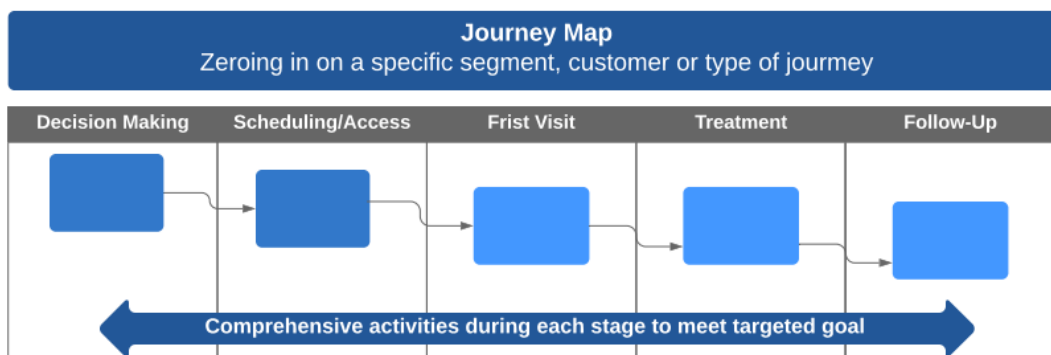
Comparatively, an **experience map** is broader in scope and allows for more variation in the journey. It is the preferred tool for understanding how multiple pieces of the journey fit together, and when there is a lack of clarity about which areas of the journey are problematic. Experience maps account for a wider variety of tocuhpoints and experience stewards, and evaluate omni-channel communication and marketing. For this reason, an experience map is usually preferred as a foundational tool, though later may be narrowed to a journey map after and spheres of action or specific segments of interest have been identified.

At Endeavor, we were pioneers in using experience mapping as a primary research tool for improving customer experiences. Read more here.
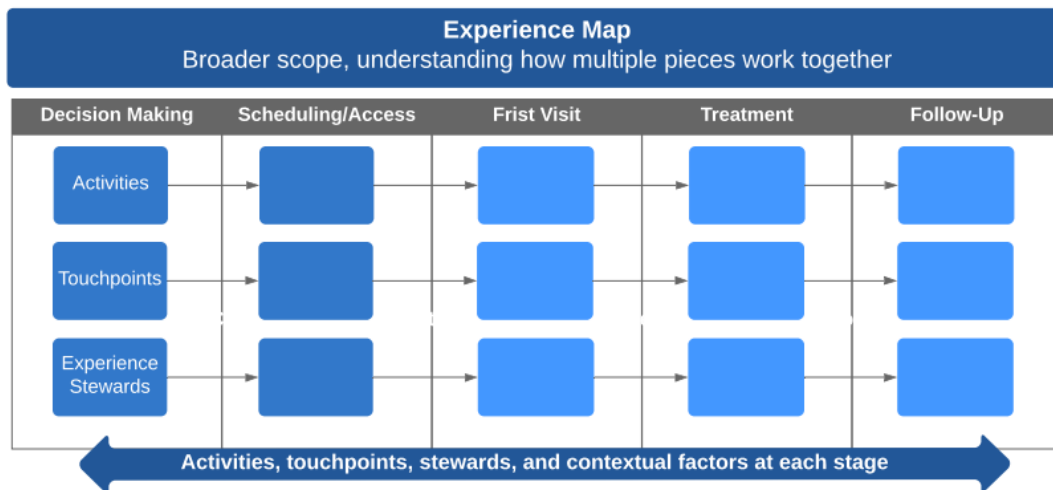

An **empathy map** can be an outcome of experience mapping, journey mapping, or other tools that provide an in-depth understanding of the customer experience. In an empathy map, needs are synthesized and categorized into 4 quadrants: says, thinks, does, and feels. Unlike experience or journey maps, empathy maps are not chronological and instead provide a picture of the customer as a whole. They are also flexible in that they can focus on summarizing all customers, focusing on one customer segment, or even honing in on a specific customer. A benefit of an empathy map is that it is concise, easy to read, and can help point out key differences among segments.

Components of an Empathy Map:
- *Says:* Contains direct quotes, which may come from research or customer feedback
- *Thinks:* Focuses on what the customer feels or thinks (In research such as user testing where the customer is face to face with the researcher, this can be derived from observations rather than direct statements)
- *Does:* Summarizes key actions taken by the customer

- *Feels:* Focuses on the emotional state, which can contain a wide variety of emotions. Such as: Impatient: seeks an appointment right away, Confident: clear about next steps in treatment
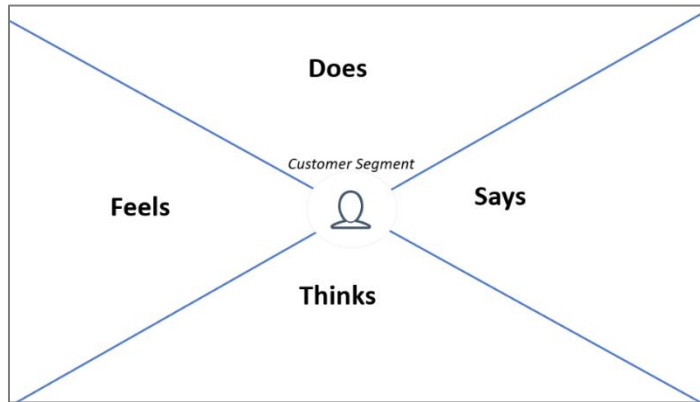
So far, the tools that we have reviewed have been focused on understanding and describing the customer experience. While they do serve to identify spheres of action for change, their primary goal is to descriptive rather than prescriptive. That's where a **Service Blueprint** comes in. Service blueprints are highly visual and detailed, combining the customer experience with what's happening in the background – such as employee actions, support processes, tools and technology, and bottlenecks/pain points. While the specific categories can be customized based on the identified needs, a good service blueprint provides a full picture of the process and includes cross-functional viewpoints. Service blueprints can be very useful for increasing operational efficiency or redesigning services.

There are typically primary "lanes" that frame the blueprint:
- Line of interactions (Also called front-stage) - The ways in which customers interact with the organization or employees
- Line of visibility (Also called back -stage) - The point at which processes happen in the background and are not visible to customers
- Line of internal action (also called support processes) - The point at which staff who don't have direct action with the customer support the process behind the scenes).

Line of interaction: Measurements, touchpoints, customer actions, onstage staff actions

Line of visibility: Backstage staff actions, technology, other touchpoints

Line of internal action: Supporting processes, support staff actions
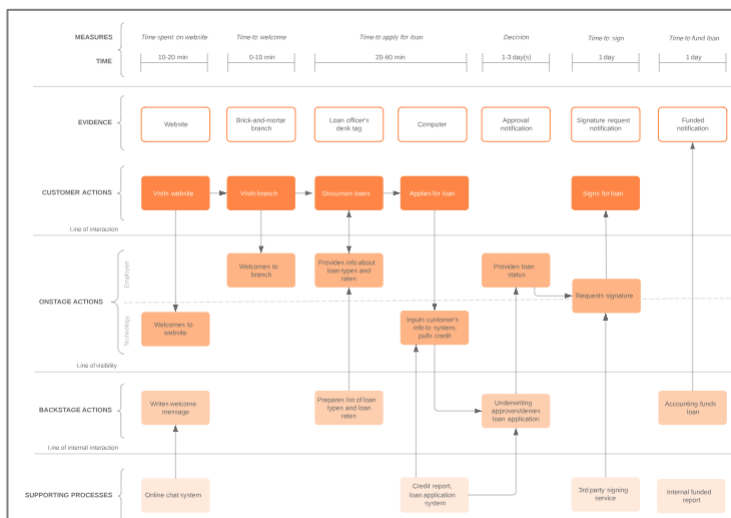
Armed with foundational insights about improvements that need to be made to provide an ideal experience, it's time to design and implement solutions. **Human Centered Design** is an approach to problem-solving that focuses on designing solutions that are focused on the customer's needs.

After building empathy and honing in on the customer's needs, the teams focus on identifying opportunities and possible solutions (similar to a typical brainstorming phase). It's important to encourage the development of a wide range of solutions, and not to judge or "throw out" ideas too early in the process. Later, ideas can be prioritized and analyzed (a simple vote by post-it note can be very effective). If possible, it is ideal for ideas to be tested and refined before being rolled out on a wide-scale basis. For example, a hospital may select one clinic or service area to serve as a test pilot. It's important to continue to keep the customer needs at the center of solution design, and to continue revising and improving solutions. Particularly in healthcare where needs and experiences vary widely by service time, clinics or services should have the flexibility to make the solution "their own" within certain parameters.

At Endeavor, using Experience Mapping insights as a foundation, we facilitate planning workshops with cross-functional teams in the areas of marketing, behaviors, and operations. In line with human centered design, our approach ensures the patient-family needs are always kept at the center of problem solving, and the cross-functional teams help promote buy-in, decrease silos, and identify existing best practices. Read more here.

Ultimately these tools are all proven, useful, and actionable. Selecting "right" tool depends on your specific objective and strategy. As a first step, create alignment around the primary target - consumers, customers, or patients. Providing an excellent experience and earning advocacy requires first a solid strategic and holistic vision - including an in-depth understanding of the current situation (based on insights rather than assumptions). This must be followed by logistical and tactical planning to enact changes in process, behaviors, and communication.

About Endeavor Management

Endeavor Management is a management consulting firm that leads clients to achieve real value from their strategic transformational initiatives. We serve as a catalyst by providing the energy to maintain the dual perspective of running the business while changing the business through the application of key leadership principles and business strategy.

In 2012, Gelb Consulting became an Endeavor Management Company. Our combined experience (Gelb founded in 1965) offers clients unique capabilities to focus their strategic initiatives with a thorough understanding of customer needs to drive marketing strategies, build trusted brands, deliver exceptional customer experiences and launch new products. Our experienced consultants and analysts use advanced marketing research techniques to identify customer needs and spot high potential market opportunities.

The firm's 40 year heritage has produced a substantial portfolio of proven methodologies, enabling Endeavor consultants to deliver top-tier transformational strategies, operational excellence, organizational change management, leadership development and decision support. Endeavor's deep operational insight and broad industry experience enables our team to quickly understand the dynamics of client companies and markets.

Endeavor strives to collaborate effectively at all levels of the client organization to deliver targeted outcomes and achieve real results. Our collaborative approach also enables clients to build capabilities within their own organizations to sustain enduring relationships.

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