

Trust Board

TB2008.38

From: Mrs Elaine Strachan-Hall, Director of Nursing & Clinical Leadership
Date: May 2008
Subject: **Customer Care Strategy**
For: **Decision**

Synopsis

A key strategic objective for the ORH (ORH Business Plan for 2008/09) is to improve the overall patient experience by offering excellent customer care. The development of a customer care approach will also support the continued progress already made as a hospital of choice for our patients. The approach we take in providing customer care, will also focus on how we demonstrate the services provided by the ORH are delivered to a high quality and consistent standard.

The document sets down the intended approach for 2008/09 and the initiatives to establish a customer care approach. This will link to other key strands of work across the ORH such as the public engagement strategy, patient and public information strategy and the communications strategy. It will also link into the work being undertaken to achieve Foundation Trust status.

The Board is asked to approve the approach and the direction of travel. More detailed plans will be developed by the Customer Care Strategy group led by the Director of Nursing & Clinical Leadership.

Financial, legal and risk impact

The plans outlined will support the ORH business objectives and failure to implement customer care could compromise these. The plans will also enhance existing key organisational strategies already outline above and associated compliance with the Healthcare Commission core standards.

Customer care – the ORH approach

1. This document outlines the approach being taken to ensure that the Oxford Radcliffe Hospitals NHS Trust (ORH) delivers high levels of service and care to patients and their families, and that the standards are as high as they can be. It is particularly focused on how we can make sure that we demonstrate that we can become the hospital of choice for our patients and that we are able to care and services of high and consistent quality.
2. It proposes plans for the coming year that will support the objectives of the Trust and in addition, provide support to the design and delivery of training for staff. It links into the work being done to become a Foundation Trust.
3. A practical guide will be produced for staff which sets out the values we intend to work to, the objectives we are looking to achieve and the standards we expect from all staff, clinical and non clinical. It will be used to support the ORH approach in changing attitudes and the organisational culture towards customer care.
4. The first of the ORH's strategic aims is as follows:
 - 4.1 To be the hospital of choice for patients by providing an outstanding environment for clinical services with customer-focused patient care that will be valued by our partners and the communities we serve.
5. A key strategic objective agreed in the ORH's Business Plan for 2008/09 is to improve the overall patient experience by offering excellent customer care alongside the commitment to and recognition of the individual's right to equality, respect, privacy and dignity. This objective has a number of associated objectives as follows:
 - 5.1 To improve the customer focus of patient care, including talking to patients about the changes they would like to see, and to develop a culture that prioritises patient care and safety.
 - 5.2 To understand and meet the needs of our customers; especially the GPs and the DGHs.
 - 5.3 To achieve all access targets through the innovative and intelligent redesign of patient pathways.
6. Our customer care approach draws on and is linked with a number of strands including:
 - 6.1 the embedding of the Trust Values endorsed by the Board as part of the Business Plan in March 2008;
 - 6.2 the patient and public engagement strategy approved by the Trust Board in March 2008;
 - 6.3 the patient and public information strategy approved by the Governance Committee in March 2008;
 - 6.4 the communications strategy approved by the Executive Board in March 2008;

- 6.5 the development of marketing activities and the ORH brand;
 - 6.6 the standards for nursing and midwifery practice already in place;
 - 6.7 the continued implementation of existing, and the development of new, performance improvement initiatives; and
 - 6.8 the developing membership strategy associated with Foundation Trust status.
7. In taking forward this work over the next two years, we shall draw on good practice from other organisations within the NHS and in the private sector. In particular, our plans include:

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8. The bringing together of the PALS, comments and complaints department and patient and public involvement departments into a single patient services team. This new team will have four core aims:
 - 8.1 Responding to and resolving patient issues, including complaints, collating themes and making sure that learning and good practice can be shared.
 - 8.2 Building capacity to find out what matters to people as individuals and helping staff to act on what they discover.
 - 8.3 Working proactively with existing and new services to ensure customer care is fundamental to how the service is provided. This might for example include the operational service centre which will oversee patient access for emergency and planned care.
 - 8.4 Facilitating a robust programme of patient and public engagement and involvement across the Trust in line with the agreed strategy to ensure that every service can demonstrate the impact of the patient and public perspective on their activity.
9. Consideration of the recruitment of a customer service professional with industry experience to advise on and deliver the strategy operationally and provided focused management of the patient service team.
10. Exploration of the opportunities afforded by transferring the management of corporate reception staff to the patient service team.
11. Chaplaincy and bereavement services have much to offer the customer care perspective, ranging from assisting with a prompt and supportive resource for complaints (particularly out-of-hours) through to providing anonymised monthly feedback reports. We will explore the possibilities offered by this enthusiastic department.
12. Clear statements to patients, carers, visitors and staff on how they should expect to be treated. These customer care standards will be incorporated into a practical guide for staff and will be used to inform expectations of customer service across the Trust.
13. We will develop staff capability through induction and customer service training programmes.

14. The initial design and provision of improved and focused training for staff to support change and improvements in customer care for all departments. A programme will be drawn up to link with the recruitment, induction and appraisal of staff. This programme will be developed over two years and focus particularly on clinical areas starting with the wards and outpatient areas. The training will include standards for the use of telephones and email. The training will be built on a customer care framework (see page 8) which provides three areas of focus –the place, the people and the processes.
15. The induction programme for staff will be kept under review and amended to take account of agreed customer care standards and the training available.
16. The identification of a style for all reception and public areas (perhaps with an interior designer) which reflect the values and functionality of the department and is linked to the ORH brand development. We will identify a service ambassador for all our public reception areas with the authority to take ownership of the meet and greet functions (i.e. reception and way-finding responsibilities). These individuals will be provided with industry standard customer care skills and charitable funds will be made available to make improvements.
17. The provision of a team of individuals to support and work with the staff based in specific geographical areas to consider how staff training and small changes to attitude and the environment can make a significant difference. An initial pilot of a customer care peer review tool has been undertaken in the chest outpatient department. The tool is being further developed and will be used to show examples of good practice and the opportunities provided by current performance improvement work.
18. The development of a 30 minute customer care audit: ten minutes at a patient's side observing interactions plus ten minutes at the nurses' desk or reception desk and ten minutes reflection on what could make the most difference.
19. Consideration of a staff reward scheme for excellence in customer care (consider the Carillion scheme of awarding £20 vouchers to a few people per month and describing their positive example in staff newsletters).

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20. The customer care developments will be linked directly into the recruitment of members and the Members' Council as part of the Trust's Foundation Trust application. The early engagement of members, many of whom will be patients or relatives of patients, can only contribute to improved standards and the sense of pride in the organisation and its services.
21. The plans for the Members' Council include specific areas where members (both public and staff) can get actively involved; for example, in getting the views of patients on services, on the environment and how we can improve in very specific areas; task and finish groups will be established so that the growing membership can contribute directly to the development of services and the customer care approach.

22. Further work to make sure that our written communications with patients (e.g. outpatient and inpatient letters, information leaflets) and families are as good as they can be and are of a consistently high standard in all areas. New technologies will be explored to see how these can support both communications with customers and provide the means for feedback.
23. Further work will also be extended to all inpatient areas to improve and standardise the patient information on notice boards. Each ward will have specific information along with standard corporate information and templates will be provided to ensure consistency and style guidelines are followed.
24. Particular attention will be paid to acting on the outcomes of the annual patient survey and other locally designed service based surveys.
25. The customer care training programme will be continued to ensure that all areas, including support areas and 'back room' functions are covered. Specific training will also be provided to managers looking at both customer satisfaction and the customer experience.

Summary

26. This document provides a basis for wider consideration across the Trust, should the Board approve the proposed direction of travel. It provides a template of action for agreement across the Trust. Clearly initiatives will need to dovetail with the Foundation Trust application processes, performance improvement initiatives and build on the work done within the Strategic Review.

Elaine Strachan-Hall, Director of Nursing & Clinical Leadership
Michael Fanning, Deputy Director of Nursing & Clinical Leadership
May 2008

Customer care handbook

Welcome to our customer care handbook. This will be developed and added to throughout the year as new initiatives are put in place and as good practice examples are identified. It contains:

- the ORH's values;
- the ORH strategic aims for 2008/09;
- the customer care framework diagram;
- our standards for customer care; and
- detailed tips on, for example, telephone standards, working on a reception desk and the use of email.

ORH Values

The values agreed by the Trust Board as part of the 2008/09 Business Plan underpin everything that we do and reflect our total commitment to patient care both now and in the future. They recognise the importance of working with patients and other customers, the importance of the safety and quality of our care, and, as we move towards Foundation Trust status, the importance of maintaining and developing academic excellence. Our values are set out below:

Safe quality care

We will continue to improve our high standards of care and treatment, ensuring that they are safe, leading-edge and informed by evidence.

Involving our patients

We will involve our patients in the planning of their care through good communication and providing information to enable them to take informed decisions and make choices: we aim to meet expectations with humanity, dignity and honesty.

Valuing and caring for our staff

We will help staff to fulfil their potential so that they in turn can care fully for our patients. We will also help our staff to balance their home and their working lives.

Academic excellence

We will carry out and support world class research, education and teaching to benefit patients now and in the future.

Working with others

We will work together to build effective teams and develop our partnerships within the local community for the benefit of all patients and stakeholders.

A healthy environment

We will continue to invest in the quality of the built environment.

Listening and learning

We will continue to be a learning organisation building on the experiences of other health providers nationally and internationally. We will build on the feedback from our patients commissioners and the wider community.

The vision and strategic aims 2008/09

The ORH's vision and strategic aims have been developed as part of the Strategic Review and recognise the strategic context within which the ORH is working. The vision for the ORH is that we become:

A successful NHS academic health sciences centre, achieving international excellence in patient care, research and education, and contributing to the health of current and future populations.

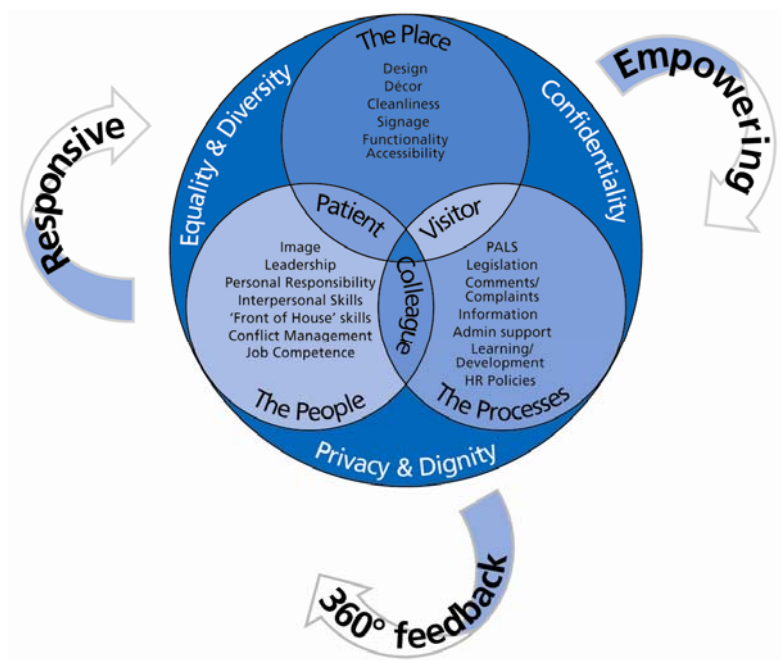
The strategic aims draw on this as follows:

- To be the hospital of choice for patients by providing an outstanding environment for clinical services with customer-focused patient care that will be valued by our partners and the communities we serve.
- To be a world leading teaching hospital and pre-eminent academic health sciences centre with an international reputation for advancements in medicine and biomedical research, able to offer specialist expertise and outstanding teaching and treatment facilities.
- To achieve financial sustainability and long term growth by intelligent redesign of our hospital services based on improved leadership, productivity and efficiency.
- To be an excellent employer with flexible and workable policies that will encourage the recruitment and retention of top quality staff.

Customer care framework

It brings together three areas of focus which directly impact on the customer experience can be broadly divided into three areas:

1. The **PLACE** – how well the environment lends itself to a positive customer experience. This includes the design and décor, standards of cleanliness; the quality of signage, accessibility and whether or not the area works.
2. The **PEOPLE** – who individually and collectively take ownership of and responsibility for projecting an image which reflects the core values and desired standards of the organisation, and who inspire confidence and gain the respect of their customers. They are positive, confident and competent, and feel valued and empowered by the organisation. Leadership and management style is key to ensuring that a culture exists that promotes the core values and standards.
3. The **PROCESSES** – that provide the infrastructure essential to the delivery of an effective service. These include information and administrative systems, feedback mechanisms to inform service development and delivery and measure success, legislation and the resulting policies which provide a framework within which staff can operate with confidence and safety, and last but not least training and development, without which none of it would be possible.



Customer Care Standards

This is the commitment we give to patients, carers, visitors and colleagues on the standards we intend to uphold. These draw on the ORH's values and the framework above and each has a key principle.

First seek to understand

If staff actively seek to find out what would make a difference to people on a person by person basis they are more likely to deliver it.

Our standard is:

- To be friendly, helpful and welcoming
- To wear identification, introduce ourselves by name and role, explaining what we do
- To take time to listen and find out what people really want or need

Act on what matters and keep our promises

A fundamental of customer service is that as we make promises we must keep them.

Our standard is:

- To actively seek feedback, respond promptly and do what we promise
- To find someone else to help if we're not able to

Go the extra minute with a smile

The principle of going that extra mile and doing so willingly even when there are time constraints is important to us.

Our standard is:

- To give each person our full attention
- To offer to help, not wait to be asked

Be consistent

Whatever we do, it must be equally valid in relationships between all staff members as well as how we treat our patients and our visitors.

Our standard is:

- To treat everyone with respect, apologising if appropriate

Facilitate learning

Learning from and using experiences to continually improve our services is important.

Our standard is:

- To look for ways of improving and enhancing our services
- Tell others what we've learnt

Telephone standards

How to Answer the Telephone and Manage Positive Customer Perceptions

It's not always "what we say", but "how we say it" that creates a good or bad customer perception. We need to be aware of the 'throw-away' statements which may mean little to us but will affect the way the customer perceives the organisation.

All of the statements below can produce a poor customer perception.

Tip - imagine you are a customer hearing them during a call. Test them out on your colleagues; you'll be surprised how many people would consider some of these as perfectly acceptable.

I'm sorry I didn't call you back. My boss had us in another meeting that lasted all morning.

I hope this will solve your problem.

I don't understand why the outpatient department didn't help you.

The recruitment department has had a lot of problems lately. I'll call them and get this straightened out for you.

Mr. King is in a meeting. Why don't you call back in an hour?

I'm sorry it took so long. Now what do you want?

I'm sorry you had to wait. Our telephone operators are very slow.

Can you call back because Mrs Jones is not here at the moment? I think she's gone to the loo.

Answering the phone professionally

The rules for answering a telephone are simple but they need to be continually reviewed and practised. Following are the most basic ones, which should always be employed.

Use these four answering courtesies when answering our own phone:

4. Greet the caller

5. State the name of your department
6. Introduce yourself
7. Offer your help

Good afternoon, Medical Records department Sue Smith speaking. How may I help?

Use these four answering courtesies when answering someone else's phone:

Greet the caller

State the name of the department and the name of the person who's office it is.

Introduce yourself

Offer your help.

Good afternoon, Medical Records department, Mr Saunders' office, Sue Smith speaking. How may I help?

Show enthusiasm when you answer. Help make the caller feel welcome. A tired voice lacking in enthusiasm is very unappealing and reflects on the professionalism of the Trust.

Use friendly phrases as part of your greeting.

Thanks for calling. May I help you?

Remember to smile as you pick up the receiver.

Closing the conversation

When you finish your telephone conversation there are some appropriate and courteous statements that should always be made. You should:

8. Thank the caller.
9. Provide assurance that any promises will be fulfilled.
10. Leave the caller with a positive feeling

Some courteous closing statement examples:

Thank you for calling. Feel free to call us anytime. I'm glad we were able to help.

Goodbye and thanks for calling. I enjoyed talking with you.

If you have any additional questions please call me.

Tip: Let the caller hang up first

This is simple courtesy, plus it gives the caller a final chance to add something.

What to do when you have to put customers on hold:

11. Ask them if you can put them on hold.
12. Tell them how long they will be on hold.
13. Assure them that you will be working for them while they are on hold (tell them what you will be doing away from the phone).
14. Wait for their response.

15. When you get back to them, thank them for holding.

How to transfer customers on the telephone

- Tell customers what you can do for them. Avoid saying, "I can't help you", "That is not my responsibility" or "This department does not handle that". By giving the name of the correct person or department, you are helping the customer, so state your sentence positively. For example, "Mrs. Jones in Outpatient Department can help you with that."
- Own the contact (or complaint!). Give the customer your name, department and phone number. This is especially necessary for telephone transfers. In case the customer gets cut off or transferred to the wrong area, he/she will have the necessary information to contact the appropriate person. Also, to save yourself from repeating information, ask if he/she has a pencil ready to copy down the information.
- To stop the customer having to say everything again tell the next employee what has been said. Fill him/her in on the details of your conversations with this customer. Also tell the next employee what the customer said as well as what his/her attitudes and feelings were.

How to make a problem call

Anytime you have to make a difficult call, there are important steps to follow:

- Before you make your call, develop an action plan.
- Greet the customer in a friendly way
- Introduce yourself and the Trust and your department
- State the purpose of the call
- Deliver your message in friendly, clear and business like way, leaving room for questions
- State customer benefits/options/alternatives, if appropriate
- Ask for agreement

Here's an example:

Samantha mistakenly overbooked a training course. She needed to call Mrs. Haig to explain why the course she had booked had to be changed. Samantha developed the following action plan.

Her objective: arrange a new course date.

The approach: briefly explain the need for the change and offer two alternative dates.

Customer benefits: the course will be less crowded and Mrs. Haig will receive more individual training support from the course leader.

Good morning, Mrs. Haig. This is Samantha Rogers from L&D. How are you today? The reason for my call is to discuss your course booking. The date I booked for your team is overbooked. What I can do is offer an alternative date with fewer delegates. This

means you will be able to ask more questions and receive more attention from the course leader. I have the 16th or 20th available. Do you have a preference?

In the situation above, Samantha did a good job because she turned a potential negative situation into a positive for the customer by planning ahead.

How to respond to a complaining customer

Listen with understanding. Identify with the customer and "own" the complaint. This defuses anger and demonstrates your concern. Tell the customer something such as, "I am sorry you have been inconvenienced." Tell me what happened so that I can help you." It is vital to show a sincere interest and willingness to help. **The customer's first impression of you is all important in gaining co-operation.**

Never blame others or make excuses. Instead, take the responsibility and initiative to do whatever you can to solve the problem as quickly as possible.

Paraphrase and record what the customer tells you. Whenever you hear an important point, say,

Let me make sure I understand: you were promised an appointment at the Chest clinic and you did not receive the letter until after the date of the appointment. Is that correct?

Find out what the customer wants. When would he or she like another appointment? The customer is complaining because he or she has a problem and wants it solved as quickly as possible.

Taking Messages

A complete message includes the following:

- Name of the caller and what the call was about
- Date and time of the call
- Complete telephone number – even if the person being called already has the number
- Any other information the caller gives you

Repeat the message to the caller to make sure you have taken the message correctly and to give him/her the opportunity to check what has been told you.