

R95 Workgroup Meeting & Discussion Virtual Meeting

February 28, 2024

Substance Abuse Prevention and Control Bureau
Los Angeles County Department of Public Health

Agenda

- 3:30 pm** **Welcome & Updates-** Dr. Gary Tsai
- 3:35 pm** **Purpose of this meeting [2E-1, 2E-2, 2E-3]** - Antonne Moore
- 3:40 pm** **Designing Patient Centric Workflows - CIBHS**
Customer Walk-Through Guidance
Demonstration
- 4:45 pm** **Service Design Templates and Timeline**
- 5:00 pm** **Adjourn**

Focus Area 2: Lowering Barriers to Care

Service Design for LBC (2E-1, 2E-2, 2E-3)

Antonne Moore
Division Chief, Strategic and Network Development
Substance Abuse Prevention and Control Bureau
Los Angeles County Department of Public Health

R95 Service Design Description

The What	The Why and How	Start-Up
<p>2E-1) Service Design</p>	<p>Establish alignment in implementing organizational changes in processes that lower barriers to access services, better engages individuals in services and improves treatment completion.</p> <p>Deliverable: Complete design expectation template.</p>	<p>One per treatment agency. Tier 1 - \$1,000 Tier 2 - \$1,500 Tier 3 - \$2,000. *Invoice required if no attestation submitted</p>
<p>2E-2) Customer Walk-Through</p>	<p>Obtain an understanding of how individuals accessing or receiving services experience your agency to help generate strategies for lowering the barrier to SUD treatment in each site and facilitate improved access to care for clients.</p> <p>Deliverable: Conduct the walk-through based on established guidelines and complete the approved summary template.</p>	<p>One per identified agency Site Tier 1 - \$1,000 Tier 2 - \$1,000 Tier 3 - \$1,000 *Invoice required if no attestation submitted or # of sites changed</p>
<p>2E-3) Implementation/ Investment Plan</p>	<p>Based on customer service assessment, establish progress toward adapting organizational changes that lead to lower barriers to accessing services, better engagement of individuals in services, and improves completion of treatment.</p> <p>Deliverable: Completed investment/implementation plan using approved template outlining past barriers, actionable steps to lower barriers, timelines, and progress toward completion.</p>	<p>One per treatment agency Tier 1 - \$5,000 Tier 2 - \$7,500 Tier 3 - \$10,000 *Invoice required if no attestation submitted</p>

Customer Walk-Through Process





DESIGNING PATIENT CENTRIC WORKFLOWS

Wednesday, February 28, 2024

What We Will Cover Today



Define

Define what makes great service and compare how your personal service delivers on Kano's Model of Customer Perception.



Identify

Identify ways in which your organization can use the walk-through to design quality improvement projects to ensure a culture of continuous quality improvement.



Begin

Begin to analyze situations that are critical to engagement and generate ideas to make improvements in your work area/department.

OBJECTIVE 1

Define what makes great service and compare how your agency service delivers on Kano's Model of Customer Perception.

REFLECTION



1 minute to REFLECT
First and Last Impressions of your
organization

Customer - means the party to which the goods are to be supplied or service rendered by the supplier(staff at Prototypes). May also be referred to as the 'User/Patient or Consumer'.

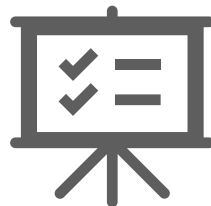
(PATIENTS) CUSTOMERS ARE LOOKING FOR 3 THINGS

How well do you deliver?

Services



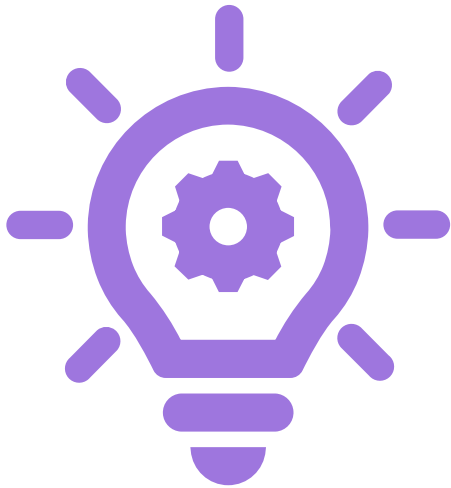
Information



Ideas



A GOOD STRATEGY....



- Involves PATIENTS, families, care givers, community partners and staff.

PROCESS IMPROVEMENT

01
Discover

03
Develop

02
Define

04
Deliver

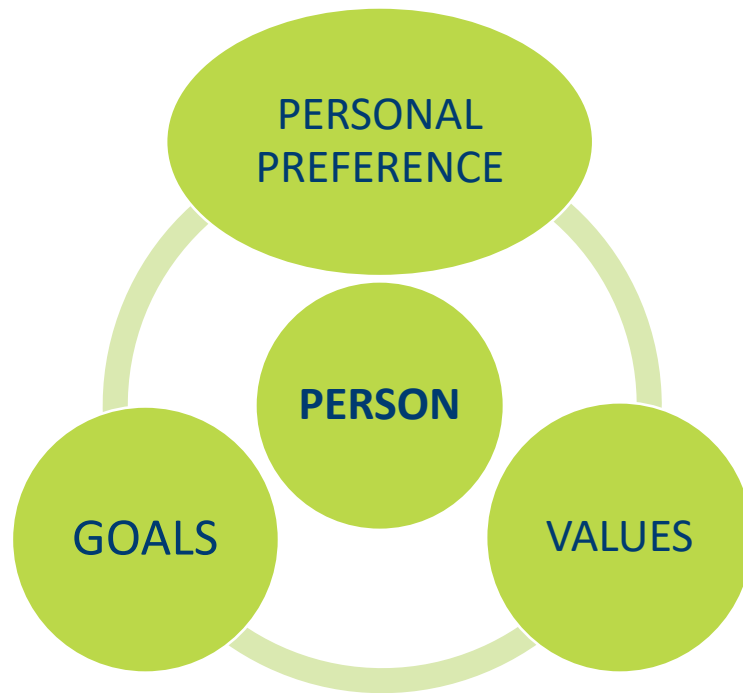
OBJECTIVE 2

Present a case for doing a walk-through in your agency from the patient's perspective to design workflows that are efficient and patient centric.

“I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

Maya Angelou

PERSON CENTERED



A person-centered approach is **where the person is placed at the center of the service and treated as a person first**. The focus is on the person and what they can do, not their condition or disability. Support should focus on achieving the person's aspirations and be tailored to their needs and unique circumstances

PROMISES

- enhance the educational and economic well-being of the people we serve by means of direct human services, advocacy, and referrals
- embrace the empowerment of people through compassion, perseverance and respect
- personal healing, development and renewal.
- access to innovative, high quality whole person care.
- **believe in finding a plan that works for your specific needs**
- programs and services are directed toward recently immigrated, economically disadvantaged youth and families, and promote community socioeconomic empowerment.
- comfortable loving environment

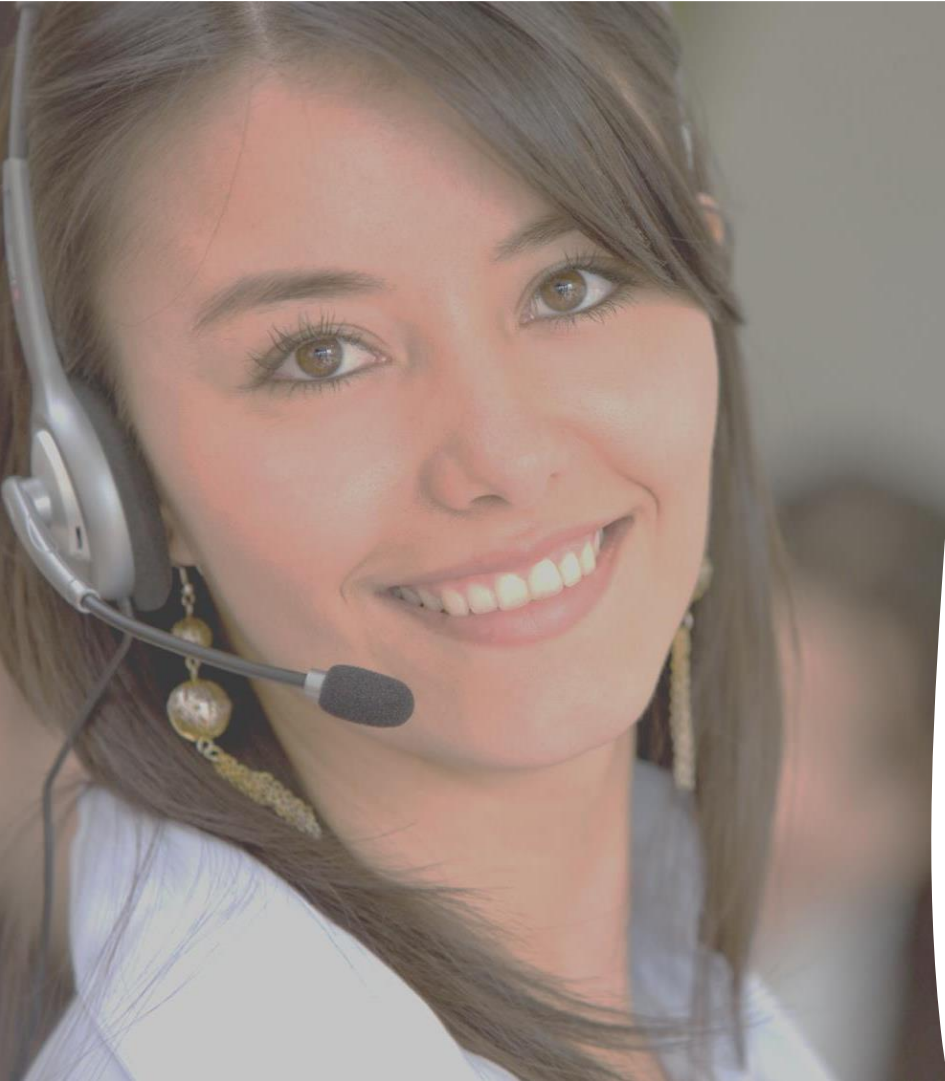
LET'S START FROM THE TOP - THE FIRST IMPRESSION RECEPTION

- Greeting
- “Triage”
 - Scheduling
 - Mini-Assessment
 - Verifying Medi-cal enrollment/Insurance
- Other
 - Filing, copying...
 - Cleaning and tidying the reception area
 - Data entry for billing
 - Other duties as assigned



What do you have to do?

- Answer the phone and “say something” so the caller knows the call is answered.
- Provide a service, information or an idea



How can you do it better?

- Smile while talking
- Talk clearly – enunciate
- Use language the customer is familiar with and understands
- Answer in 3 rings or less
- “Use a script”
- Resist the temptation to multi-task!
- Listen and ask good questions

HOW CAN YOU DELIGHT THE CUSTOMER?

Ask an open-ended question

- How Can I Best Help You Now?
- Is there anything else I can help you out with today?

- Go the extra mile - Provide additional information
- Provide the agency name & number
- Ask them to call you back personally if they need something
- **Recap the phone call and ask them to confirm next steps**

- Thank them for calling
- Wish them a great day
- Connect them to another service



Every contact we have with a customer influences
whether or not they'll come back.

We have to be great every time or we'll lose them.

– Kevin Stirtz

Marketing for Smart People



How do you know that what you do, delights your customers?

TO GET STARTED – BUILD CLARITY



PI TOOL - WALK-THROUGH

- A walk-through is a tool that allows you to experience a process from the customer's/patient's perspective.
- Develop skills for identifying core problems from the customer perspective
- The goal is to see the process from the *patients' perspective*. Taking this perspective of services—from the first step, through the final step—is the most useful way to understand how the *patient* feels, and to identify improvements that will serve the *customer* better.

WHY DO A WALK-THROUGH?

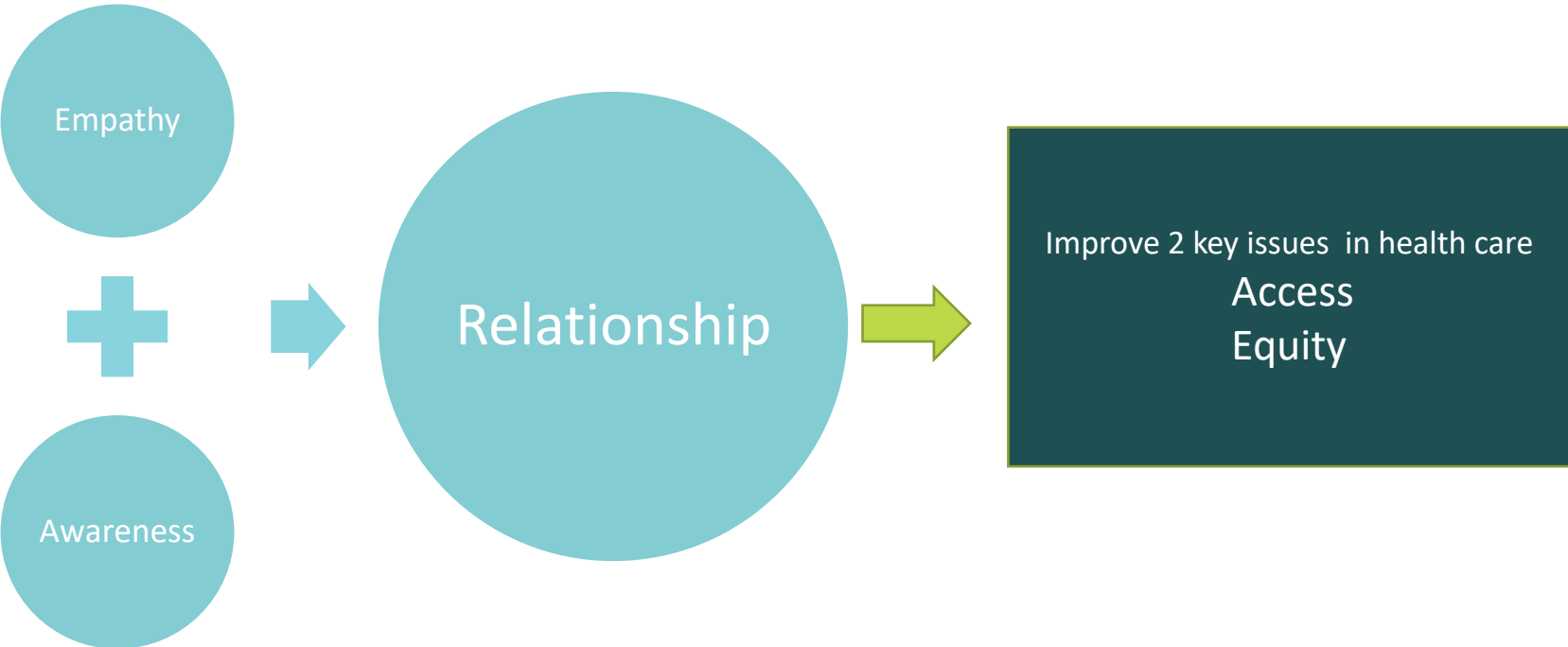
- Helps you understand the organizational processes from the client and staff perspective.
- Seeks out and identifies real problems.
- Identifies what is working.

Keeps you asking **Why ?**

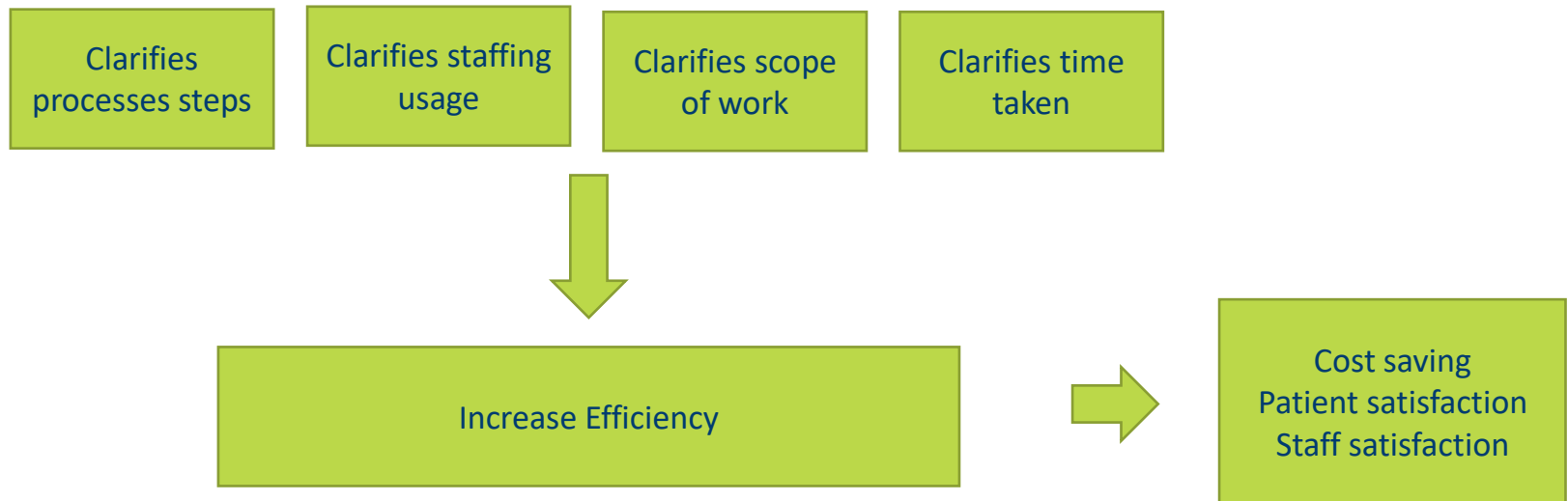
Provides a new perspective

- Allows you to **feel** what it's like
- Let's you see the process for what it is

MORE IMPORTANTLY: BUILD RELATIONSHIPS



THE BUSINESS CASE

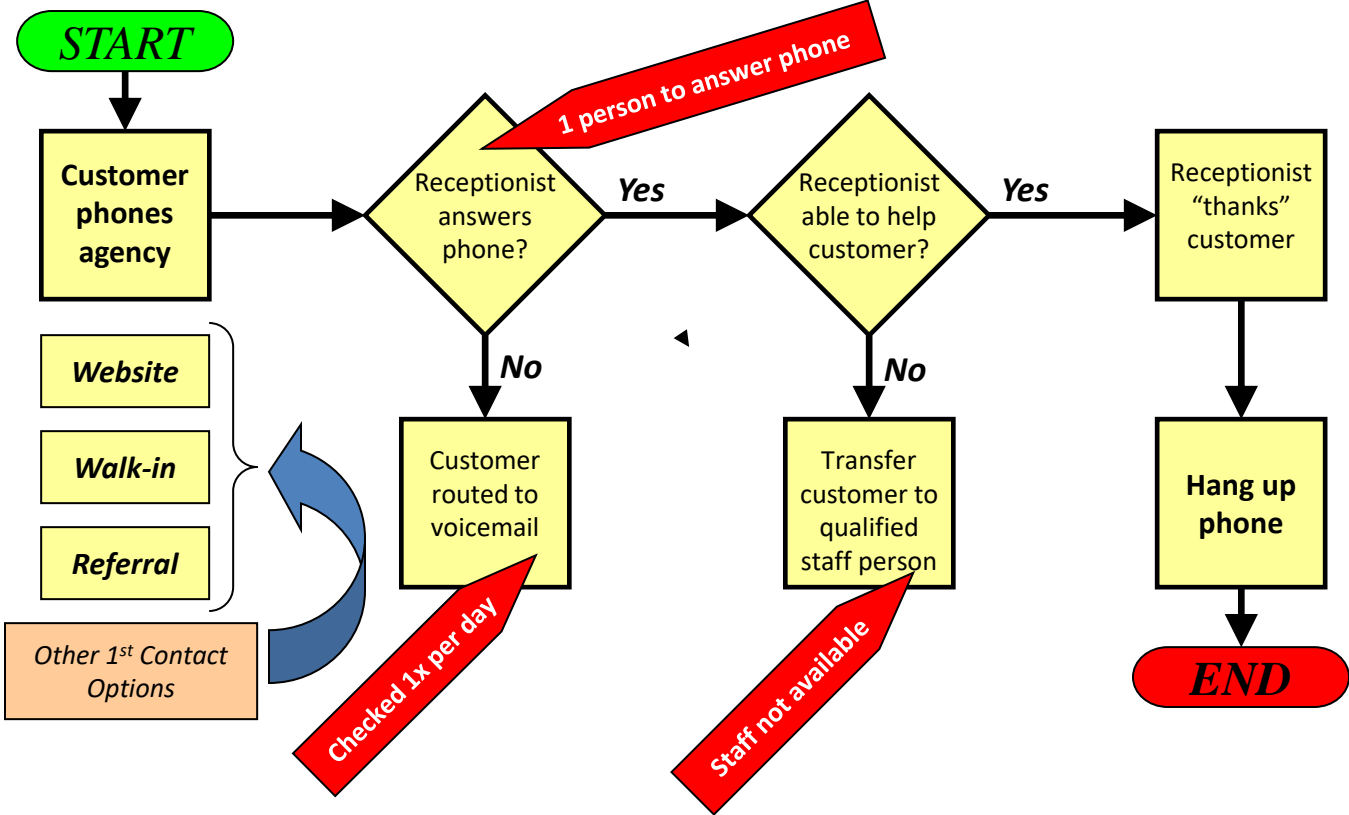


OBJECTIVE 3

Identify ways in which your organization can use the walk-through to design quality improvement projects to ensure a culture of continuous quality improvement.

Contact to Agency Response Process

Process name: *Customer 1st Contact (phone call) to Agency Response*



TODAY'S CHALLENGE

PRACTICE ACTIVITY – 10 MINUTES

1

Call Your Agency

Look up the telephone number for your agency from a web browser.

Dial the number.

2

Introduce yourself and the reason for your call

When the person answers let them know who are and tell them you are doing a walk-through of the first call to scheduling an appointment.

3

Request Services

Ask them to treat you as if you were a customer and go through the process as if the customer does.

If no one answers leave a message and ask them to call you back.

POLL

Did someone answer the phone?

Did you leave a voice message?

Were you transferred to another person?

Did you discover anything you would like to improve?

DISCUSSION

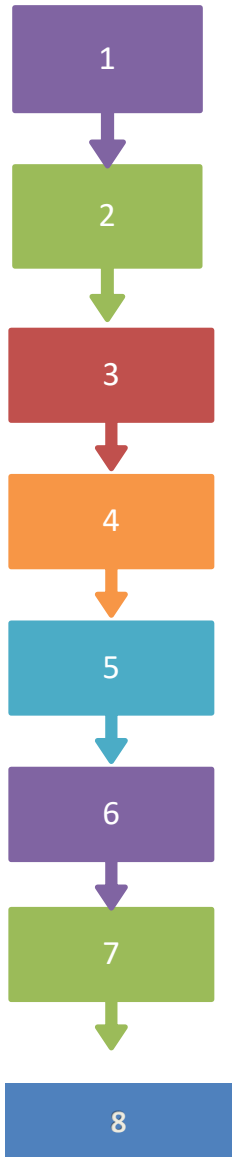
What did you learn?

How did your experience compare to Kano's Model of great service?

How did you feel?

Would you like to improve the process?

Steps for doing a walk-through



Select a process to walk-through

Select 2 people to play the role of Client/Patient & Observer/Note Taker

Let the staff know in advance that you are doing a walk-through

Go through the experience just as a typical Client/Patient would.

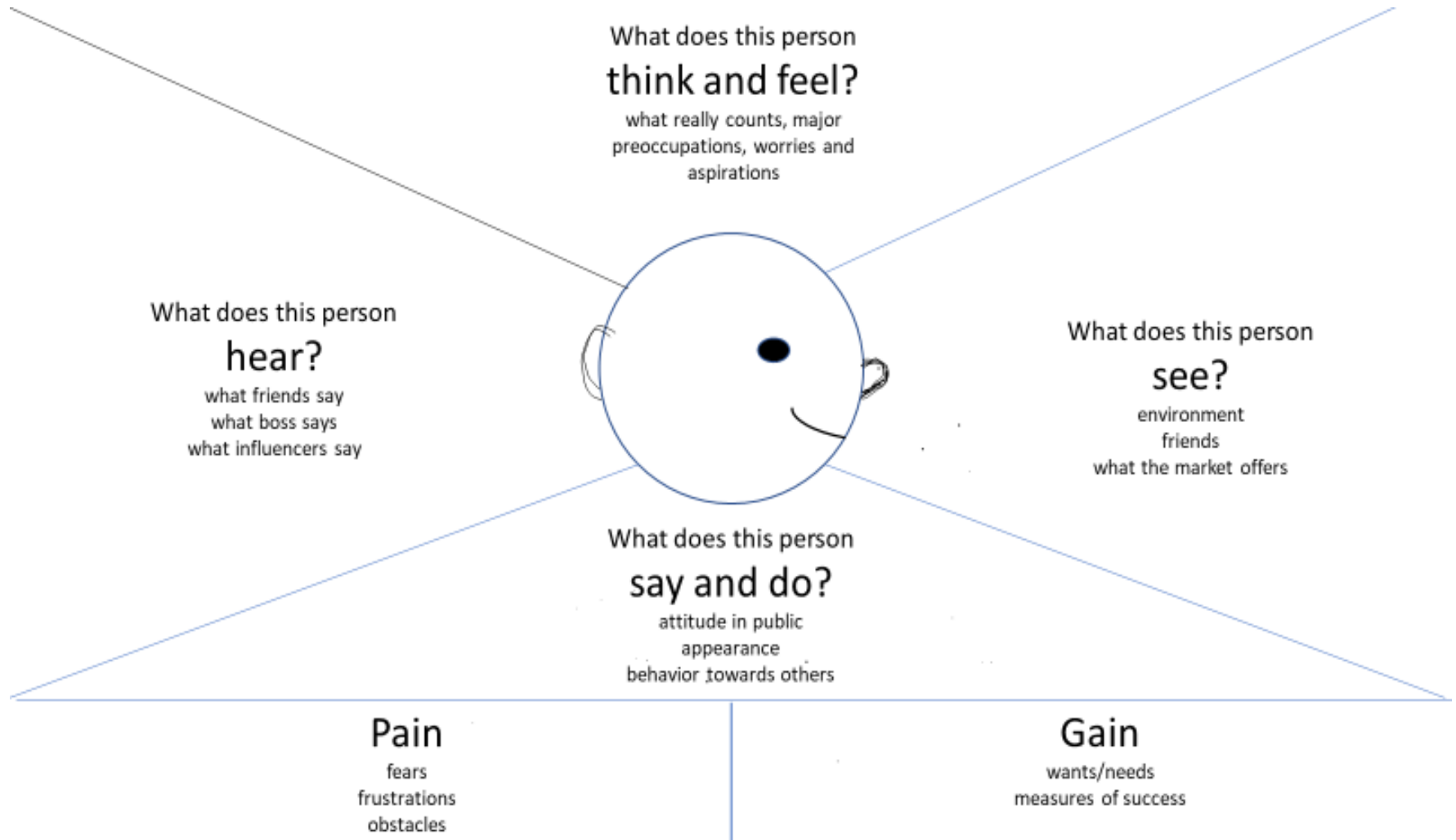
Try to think and feel as a Client/Patient would

At each step ask the person doing the work to tell you what changes would make it better (no additional resources)

Write down your observations using the instruction sheet provided.

Meet with your CEO/director, review the findings, select one or two key problems as a focus for the process improvement project.

WHAT MATTERS TO YOUR PATIENTS? CUSTOMER EMPATHY MAP



NEXT STEPS AND RESOURCES

Walkthrough of the CBI Toolkit

- CBI Walkthrough Instructions
 1. Intake/Screening
 2. Admission
 3. Counseling
 4. Care Coordination
 5. Discharge
- Customer Walkthrough Recording Template
- Service Design 2E-2: Reporting Template
- Customer Scenarios

ANY QUESTIONS?

Focus Area 2: Lowering Barriers to Care

Service Design for LBC (2E-1, 2E-2, 2E-3)

Antonne Moore
Division Chief, Strategic and Network Development
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Capacity Building 2E is designed to plan and develop service design changes to organizational process that increase access and engagement in services that better reach the 95% of individuals who need SUD treatment but who are not accessing it. The purpose of this customer service walk-through exercise is to experience the client's experience as they participate in your agency's process to identify areas for improvement, in particular related to making the experience more patient-friendly, more efficient, and "better" from the perspective of the client. This is the lens in which agencies should pursue this walk-through as part of the R95 Initiative. As part of your participation in R95 Capacity Building Deliverable 2E-2, you are required to complete a customer service walk-through and submit a this summary via email to sapc-cbi@ph.lacounty.gov with subject line "2E-2 Service Design" **FOR EACH SITE LOCATION** by 6/30/2024.

Service Design 2E-2: Customer Walk- Through Summary Template

1. Summarize key components of the walk-through:

a) What happened during the first call?

- Told to call back.
- Transferred to voicemail.
- Provided with an appointment to come in with instructions.
- Other, please describe:

b) What did you notice about the physical environment during your intake and counseling walk-throughs?

c) If English was **not** your primary language, do you think your experience would be different? If so, how? If not, why?

d) Names & Positions of staff participating in customer walk-through:

2. *What most surprised you during the walk-through:*

a. Intake:

b. Admission

c. Counseling/Care Coordination

d. Discharge

3. *In your meeting with your staff or the team that participated in walk-through, what improvements or changes did they suggest?*

Service Design 2E-2: Customer Walk- Through Summary Template

Service Design Implementation/Investment Plan Template

Divided into three sections:

1. **Assessment of Current State :**

- What organizational processes did you identify that needed to change?
- How did you determine the type of change needed?

2. **Actions Taken/to be Taken**

- Select the possible service design improvement that can be taken
 - ✓ based upon a pre-determined list
 - ✓ check all that apply
- Identify three primary actions will have already or will be taking in the next year and provide a summary of those actions.

3. **Sustainability**

- Describe your efforts to sustain these changes.

Service Design 2E-3: Action Plan Template

R95 Capacity Building Service Design Reminders

Substance Abuse Prevention and Control Bureau
Los Angeles County Department of Public Health



Lowering Barriers to Care: Service Design for LBC

- **Deliverable (Templates, Guidance, Resources) & Due Dates:**
 - 2E-2 Customer Walk Through – Due 6/30/24
 - Service Design Kit Item #1: Draft Customer Walk Through Guidance/Template for Comment - **Week of 2/26/24**
 - Provided for use **Week of 3/11/24**
 - 2E-1 Service Design – Due 6/30/24
 - Service Design Kit Item #2: Expectation Template 2E-1 for Comment **Week of 3/11/24**
 - Provided for use **Week of 3/25/24**
 - 2E-3 Improvement/Investment Plan – Due 6/30/24
 - Service Design Kit Item #3: Improvement/Investment Plan template 2E-3 for comment **Week of 3/11/24**
 - Provided for use **Week of 3/25/24**

Lowering Barrier to Care: Service Design for LBC

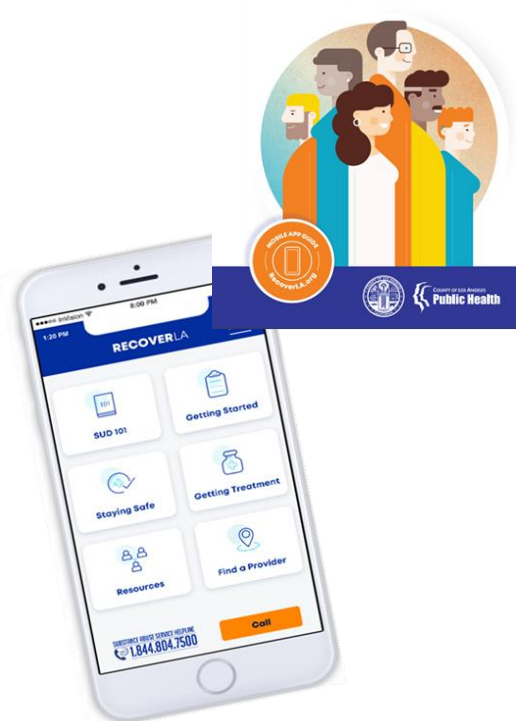
- **R95 Workgroup Meeting Dates & Agenda Topics:**
 - Wed, 3/27/24: 3:30 pm - 5:00 pm
 - Operationalizing Service Design based on Customer Walk-Throughs
 - Wed, 5/15/24: 3:30 am to 5:00 pm
 - Challenges and Opportunities with Implementation of Service Design Priority Activity

Questions, observations, insights?



RecoverLA:

A Los Angeles County Guide to
Substance Use Disorder Prevention
and Treatment Resources



Discussion

Visit RecoverLA.org on your smart phone or tablet to learn more about SUD services and resources, including a mobile-friendly version of the provider directory and an easy way to connect to our Substance Abuse Service Helpline at 1-844-804-7500!