

## 5.0 Training Recommendations

Similar training needs emerged in every department except the Cast Room. The tables in section 5.2 summarize these needs per department and staff. ACC staff will participate in the design and development of their own training program and materials, and provide feedback on vendor solutions. The ACC will provide the majority of staff resources to *create and deliver the training components* with the assistance of Learning Services. These recommendations will be updated as needed after ACC feedback.

### 5.1 Training Process

Whether a staff member is new or established, accomplished or unskilled in customer service, the proposed training process can adapt to his or her needs. Managers and supervisors can adjust live classes for their departments and meet individual staff member needs: Every associate will have a pathway to grow, contribute, and be rewarded.

New and existing staff will participate in different combinations of basic, daily, weekly, monthly, and yearly training activities ([Appendix B—page 40](#)). For example, while all staff will take the [Basic Live Class](#), new hires will first be required to complete the [Basic Online Classes](#). After this initial training, all staff will begin daily, weekly, monthly, and yearly training activities. Staff members will be provided a [Customer Service Training Notebook](#) to help them collect materials and organize their personal development. Further, a manager or supervisor can assign activities from the [Prescriptive Menu](#) as needed for individual staff training needs.

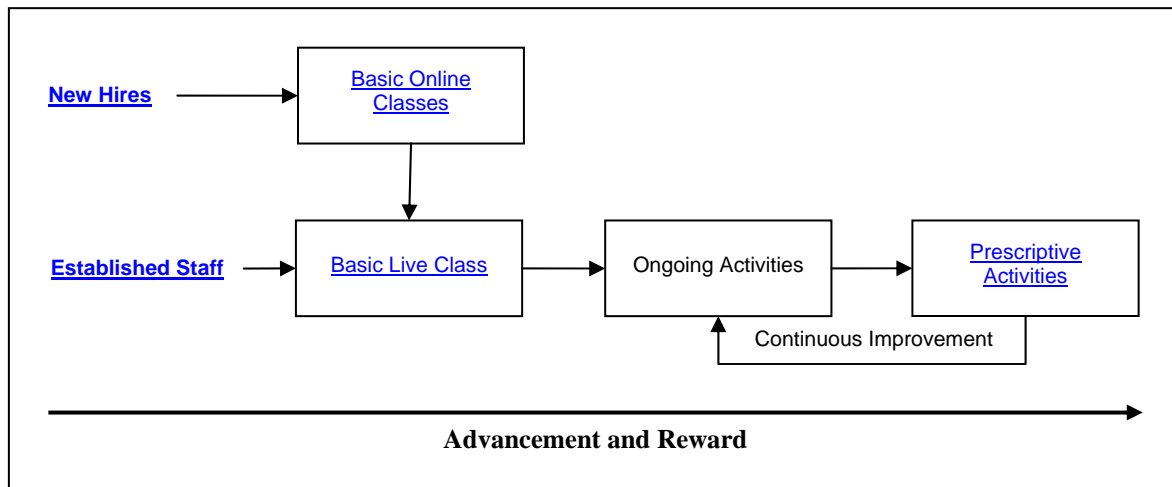


Figure 2: Proposed ACC Training Process

## 5.2 Training Program Components

Managers and supervisors will use a broad set of training tools within the new hire and existing staff tracks. These tools were derived from the main recommendations from this performance analysis:

- Customer Service Training Program. Comprehensive and overarching offerings and tools: Basic Online Classes, Basic Live Class, Team Meetings, Role-Plays, ACC Mentors, Customer Service Class Certificate, Customer Service Awards, Quarterly Staff Training Plan, Customer Service Training Notebook, Customer Service Journal, Customer Service Scorecard, and Customer Service Staff Presentations.
- Customer Service Guidelines Job Aid. A reference document to help staff remember and apply good customer service.
- Rapid Feedback System. Tools to help staff learn more about and improve their performance: Self-Evaluation, Peer Evaluation, Manager or Supervisor Staff Evaluations, Customer Feedback Card, and Periodic Customer Feedback.

Each recommendation and training component is discussed below and is found in the training processes outlined in [Appendix B](#) (page 40): New Hire Track, Established Staff Track, and Prescriptive Menu.

### 5.21 Customer Service Training Program

Recommendation	Department	Staff
Institute a comprehensive, continuous, staff-contributed, customer service training program based on the ACC Patient Focused Service Standards. Provide tracks for new and existing staff. Customize existing staff training per individual staff need.	Check Out	Patient Liaisons
	Modules	Patient Liaisons, MAs
	Registration	Patient Services Representatives
	Scheduling	Patient Services Representatives I
Description		
<p><b>Basic Initial Classes</b></p> <p><u>Basic Online Classes</u> New associates will complete a series of online customer service classes that comprise a complete course in basic customer service. They must complete these classes within one month of hire and before attending the Basic Live Class. These online classes will also be available as refreshers as needed per new hire and established staff member training need.</p> <p><u>Basic Live Class</u> All associates will complete a live comprehensive customer service class when first hired or if they have not taken the class before. This class will be offered tri-annually, and new hires must prepare by taking the Basic Online Classes. The live class will cover values, concepts, principles, and skills, and provide practice and evaluation of an associate’s customer service understanding. The class will also increase employee performance by utilizing <a href="#">Role-Plays</a> to help transfer knowledge back to the job. It can be customized for each department as needed.</p>		

## 5.21 Customer Service Training Program / continued

### **Regular Offerings**

#### Team Meetings

The current manager and supervisor team meetings will continue to stress customer service, but place greater emphasis on specific customer service behaviors. The Customer Service Guidelines Job Aid will be the focal point for communicating expectations. Managers will discuss current customer service problems, rewards, and staff suggestions. In addition, some staff will present—as individuals or groups—a customer service topic that addresses a problem or an opportunity brought up at the previous monthly team meeting. Staff who perform exceptionally well in customer service will be recognized. ACC Mentors will be recognized and recruited as well.

#### Role-Plays

Each staff member will periodically act out customer service simulations with an [ACC Staff Instructor](#). These simulations will enable staff to improve, sharpen, and deepen their skills.

#### ACC Mentors

Established staff members will be recruited to help deliver and develop customer service training, and assist other staff with feedback and training, namely, new hire [Peer Evaluation](#). They will also present customer service topics at [Team Meetings](#) and propose and help develop improved customer service training. Instructors will complete an orientation and training. Learning Services recommends that these staff receive a certification, pay differential, and recognition.

#### Customer Service Class Certificate

Staff will receive a certificate upon successful completion of the initial [Basic Live Class](#) and [Basic Online Classes](#).

#### Customer Service Awards

Staff will be given awards when consistently delivering exceptional customer service. Staff rewards will be a factor in choosing which staff become ACC Mentors. It is critical that these rewards are truly valued by staff (i.e. recognition, time off, bonuses, etc.).

#### Quarterly Staff Training Plan

Each associate will maintain and update their training plan with their supervisor each quarter. This document will be considered in their evaluation.

#### Weekly Training Checklist

Established and new hire staff are provided checklists to maintain and track their customer service training activities.

#### Customer Service Training Notebook

Each staff member will be provided a notebook for course materials, job aids, evaluation sheets, and all customer service training documentation.

#### Customer Service Scorecard

Each staff member and manager will have a scorecard based on the [Customer Service Guidelines Job Aid](#). All criteria of customer service will be defined along with point values for various levels of performance. Associates will be able to calculate a total score based on the point values they assigned to each criteria for the associate observed. This card will be the basis for the [Customer Feedback Card](#).

**5.21 Customer Service Training Program / continued**

Customer Service Journal

When staff conduct their [Self-Evaluations](#), they will make an entry in a customer service journal in their [Customer Service Training Notebooks](#). They will document good, poor, and confusing customer service situations and include these details: statement of situation, associate, date, outcomes, problems, suggestions, area/module. If successful, this tool will be tested as a shared drive database.

Customer Service Staff Presentations

Staff will be assigned or may volunteer to present a customer service topic at the [Team Meetings](#). ACC Mentors will assist other staff, as well as present regularly. Presentations may also be used to help develop or improve [Basic Online Classes](#).

**5.22 Customer Service Guidelines Job Aid**

Recommendation	Department	Staff
Provide a tool that will outline and strongly communicate performance expectations to staff. Staff should review this each day.	Check Out	Patient Liaisons
	Modules	Patient Liaisons, Medical Assistants
	Registration	Patient Services Representatives
	Scheduling	Patient Services Representatives I

Description

Customer Service Guidelines Job Aid

Each staff member will display the Customer Service Guidelines Job Aid in his or her work area. This tool will list key steps in the ideal customer service process, as well as well-defined and specific criteria for staff behavior: It will be very descriptive of what excellent customer service looks like in terms of voice, facial expressions, body language, etc. This tool will help in the design of self, customer, peer, and manager evaluations of staff performance, including the [Customer Service Scorecard](#) and [Customer Feedback Card](#).

5.23 Rapid Feedback System

Recommendation	Department	Staff
Create a rapid staff performance feedback system—customers, managers, peers, and self.	Check Out	Patient Liaisons
	Modules	Patient Liaisons, MAs
	Registration	Patient Services Representatives
	Scheduling	Patient Service Representatives I

Description
<p><u>Self-Evaluation</u> The staff member will rate his or her customer service performance based on all customer contacts for a specified period. These numbers and comments will be recorded on a <a href="#">Customer Service Scorecard</a> whose criteria are based on the <a href="#">Customer Service Guidelines Job Aid</a>. The associate will also document one customer encounter and mark it as a good, poor, or confusing customer service situation. Staff will use the <a href="#">Customer Service Journal</a> in their <a href="#">Customer Service Training Notebooks</a>.</p> <p><u>Peer Evaluation</u> Staff members will have a peer observe and <i>secretly</i> evaluate their customer service delivery with three customers. The peer will use the <a href="#">Customer Service Scorecard</a> for each of these three customer contacts and discuss this set of evaluations with the staff member requesting this evaluation set. A <i>different</i> peer must conduct the evaluation set each time for the staff member. New hires will use one ACC Mentor for this evaluation set for their initial 90-day period.</p> <p><u>Manager or Supervisor Staff Evaluations</u> Managers and supervisors will continue their current methods but utilize the <a href="#">Customer Service Scorecard</a> and meet quarterly with each associate to provide feedback. Managers and supervisors will also make frequent, informal observations as needed.</p> <p><u>Customer Feedback Card</u> These cards will be prominently displayed in each area. Customers will rate associates on a simplified set of criteria and drop completed cards in feedback boxes. An online version of these feedback forms should be provided to customers scheduling via phone. Each card will have a spot for the associate’s name. This effort will be coordinated with other feedback solicited by Patient Relations.</p> <p><u>Periodic Customer Feedback</u> Each associate will point out the Customer Feedback Card to <i>every</i> customer with whom he or she works. The cards will be in a rack with a space for the associate’s name. Customers can return the cards in a feedback box in the area. Customer feedback will be compiled for each associate and provided at the Manager or Supervisor Staff Evaluations. Scheduling staff will provide a web page address and their names for callers to provide feedback. Managers and supervisors will ensure that cards and web page addresses are routinely advertised.</p>

## 6.0 Conclusions and Next Steps

Customer service in the ACC is the product of many factors. Improvement will be directly proportional to addressing the most significant performance barriers and providing management and staff with the tools to address them. Customer service improvement and all ROI targets will depend on a comprehensive, continuous performance improvement program in the ACC that addresses all factors. ACC adherence to recommended work flows should be investigated and remedied if necessary.

Training is a key component in this solution system. Evaluation of departmental and individual training needs should determine who gets what, how much, and how often. Again, the impact on customer service from the training program will not only depend on the quality and delivery of the program, but very much on drivers other than skills and knowledge: *The other performance barriers currently have a much greater impact.* Yet, the solution will only be complete with effective training.

As the training program is developed and implemented, manager and staff feedback will drive upgrades to the overall process: It must seamlessly integrate with current operations and be perceived as a regular part of the job, not an isolated event. Continuous active participation, reflection, and redesign, will be key to helping each staff member and the training program adapt and improve.

**A training design and project plan will be provided next that outlines distinct behavioral goals for staff and factors that affect training in the staff environment. This design will pave the way for a successful training program. It will demonstrate the best way to remove the skills and knowledge barriers to excellent customer service and determine development of the training program.**

The contributions of ACC management and staff have been crucial in this analysis and will continue to be a highly valuable resource in the positive transformation of the ACC.

## 7.0 Report Approval Signoff

This approval is given to Nemours Learning Services from the NCC Ambulatory Care Center (ACC) at the Alfred I. duPont Hospital for Children and refers to the contents of this report.

### 7.1 Services

Nemours Learning Services will base the next project deliverable—the **project plan**—on this performance analysis report. All training deliverables in this initial implementation will rest on ACC approval of this performance analysis report. The effectiveness of the training program will in large part be determined by how well ACC addresses the staff performance barriers discussed in this report.

### 7.2 Contacts

The following contact is the primary sponsor who has reviewed and approved this report:

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These project contacts have reviewed and approved this performance analysis report, and acknowledge this with their signatures:

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\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

#### Nemours Learning Services

Christopher Lepine, M.Ed.

Instructional Designer I

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Signature

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Date

## 9.0 Appendix B: Training Process

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9.1 New Hire Track

New Hire Track												
Activities (first 3 months)	Frequency											
<b>Basic Initial Classes</b>												
Basic Online Classes (CBLs)	Once (within 1 month of hire)											
Basic Live Class	Once (offered tri-annually; prerequisite: Basic Online Classes)											
	Hour											
<b>Daily</b>	1	2	3	4	5	6	7	8				
Review Quarterly Staff Training Plan.												
Review Customer Service Guidelines Job Aid.												
Self-Evaluation and Customer Service Journal												
	Day											
<b>Weekly</b>	1	2	3	4	5	6	7					
Study Basic Online Classes as assigned.	2 hrs., any days											
Peer Evaluation - from other staff	20 mins., any 2 days											
Role-Play with ACC Mentor.	20 mins., any day											
	Week											
<b>Monthly</b>	1	2	3	4	5							
Team Meetings	any week											
	Month											
<b>Yearly</b>	1	2	3	4	5	6	7	8	9	10	11	12
Manager or Supervisor Staff Evaluations												
Periodic Customer Feedback												

## 9.2 Established Staff Track

Established Staff Track												
Activity	Frequency											
<b>Basic Initial Classes</b>												
Basic Live Class	Once (offered tri-annually)											
	Hour											
<b>Daily</b>	1	2	3	4	5	6	7	8				
Review Quarterly Staff Training Plan.												
Review Customer Service Guidelines Job Aid.												
	Day											
<b>Weekly</b>	1	2	3	4	5	6	7					
Study Basic Online Classes as assigned.	2 hrs., any days											
Self-Evaluation and Customer Service Journal	once, any day											
Peer Evaluation - for other staff as requested.	any days											
ACC Mentor Duties (if applicable)	any days											
Customer Service Staff Presentations preparation (as assigned)	2 hrs, any days											
	Week											
<b>Monthly</b>	1	2	3	4	5							
Team Meetings	any week											
Peer Evaluation - from other staff												
	Month											
<b>Yearly</b>	1	2	3	4	5	6	7	8	9	10	11	12
Manager or Supervisor Staff Evaluations												
Periodic Customer Feedback												

## 9.3 Prescriptive Menu

Prescriptive Menu	
Activity	Frequency
Peer Evaluation	manager determined
Basic Online Classes	manager determined
Role-Plays with ACC Mentors	manager determined
Manager or Supervisor Staff Evaluations	manager determined
Customer Service Staff Presentations	manager determined