

Creating Positive Impressions

Leader's Guide



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Creating Positive Impressions

Leader's Guide for Management Training

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Internal Agenda

Welcome	4 minutes
<ul style="list-style-type: none">▪ Welcome participants to today's session. Introduce yourself and have participants introduce themselves. Remind the group why the REACH for Excellence initiative deserves special attention.	
Part I: Service Excellence	
Ice Breaker (The "Seated" Line Dance)	15 minutes
<ul style="list-style-type: none">▪ Break the ice with brief discussions about customer service issues, including what we would like our customers to say about their expectations at Saint Raphael's.	
The REACH for Excellence Progress Report	5 minutes
<ul style="list-style-type: none">▪ Provide an update on the REACH for Excellence initiative, identifying work completed by various employee groups.	
The REACH for Excellence Standards	12 minutes
<ul style="list-style-type: none">▪ Provide a brief description of the six proposed standards [2 minutes], and identify / discuss behaviors that will allow all of us to Create a Positive Impression [10 minutes].	
Creating Positive Impressions	15 minutes
<ul style="list-style-type: none">▪ Part I: Creating Positive Impressions video – Illustrate the inappropriate and appropriate service behaviors seen at Saint Raphael's [5 minutes].▪ Part II: Performance Standards Manual – Share the organization-wide behaviors associated with <i>Creating Positive Impressions</i> [10 minutes].	
Behavior Change 101	15 minutes
<ul style="list-style-type: none">▪ Introduce the Model of Planned Behavior to help explain the complexities associated with individual behavior change and to help employees understand the importance of the action tools used for holding each other accountable.	

Internal Agenda (*con't*)

**** 10-Minute Break ****

- What Can I Do? 20 minutes
- Provide an interactive learning experience focused on how we can help each other create positive impressions with all of our customers. Introduce various tools including: the What Can I Do Decision Tree [3 minutes], the Sticky Situations [9 minutes], and the What Can I Do Action Tools [8 minutes]

Part II: Engaging Your Employees

- Sending and Reinforcing the Message 3 minutes
- Identify formal and informal methods for sending and reinforcing the message to all employees that Saint Raphael's expects everyone to be actively engaged in providing outstanding customer service.

- Observing and Evaluating Performance 5 minutes
- Provide managers with tips for observing and evaluating employee performance, and share the changes made to the Behavioral Expectations Form and the customer service element of the Management CBPE.

- Service Stinkers 7 minutes
- Help managers identify behaviors and characteristics of their "service stinkers," and provide them with the steps for on-going performance management.

- Management Development Training 3 minutes
- Share information on the new management development training curriculum which all supervisory employees – up to and including the senior leadership team – must complete.

- What's Next? 1 minute
- Share next steps related to *Creating Positive Impressions* and encourage participants to talk with their supervisors about the REACH for Excellence initiative.

Internal Agenda (*con't*)

Closing	1 minute
▪ Share final thoughts / thank participants for their time, attention, and participation.	
The REACH for Excellence Bracelet and Pledge	3 minutes
▪ Introduce the REACH for Excellence Pledge and the idea of an organization-wide commitment to providing outstanding customer service.	
▪ Distribute the Pledge with the REACH for Excellence bracelet.	
Attendance and Evaluations	4 minutes
▪ Distribute the attendance sheets and ask participants to complete a program evaluation form before leaving.	

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Internal Program Notes

MIN	ACTIVITY
N/A	<p data-bbox="370 606 971 648">PURPOSE OF WORKSHOP</p> <p data-bbox="370 701 781 743"><i>Part I: Service Excellence</i></p> <ul data-bbox="370 785 1330 1293" style="list-style-type: none"><li data-bbox="370 785 1330 863"><input type="checkbox"/> To build our understanding of the REACH for Excellence initiative<li data-bbox="370 915 1208 957"><input type="checkbox"/> To introduce the REACH for Excellence standards<li data-bbox="370 999 1308 1077"><input type="checkbox"/> The kick-off our first targeted standard which is <i>Creating Positive Impressions</i><li data-bbox="370 1129 1330 1207"><input type="checkbox"/> To examine ways we can support each other in making our organization better<li data-bbox="370 1249 764 1291"><input type="checkbox"/> To look at next steps <p data-bbox="370 1344 915 1386"><i>Part II: Engaging Your Employees</i></p> <ul data-bbox="370 1428 1422 1717" style="list-style-type: none"><li data-bbox="370 1428 1300 1470"><input type="checkbox"/> To provide tools for sending and reinforcing the message<li data-bbox="370 1512 1292 1589"><input type="checkbox"/> To clarify the role that supervisors and managers play in performance management<li data-bbox="370 1642 1422 1719"><input type="checkbox"/> To discuss on-going management development efforts to support the REACH for Excellence initiative

MIN**ACTIVITY**

PRE-TRAINING PREPARATION

- ❑ **Obtain** the following supplies:
 - ✓ One Leader's Guide for each facilitator
 - ✓ One copy of the Employee's Workbook for each participant + extra copies
 - ✓ One copy of the Performance Standards Manual for each participant + extra copies
 - ✓ One copy of the REACH for Excellence Pledge for each participant + extra copies
 - ✓ One copy of the Creating Positive Impressions video
 - ✓ One VCR already hooked up to a tv screen / monitor
 - ✓ Enrollment roster
 - ✓ Name tags with small group assignments (e.g., 1 – 4)
 - ✓ Blank attendance sheets
 - ✓ One large flipchart and markers
 - ✓ Four table top flipcharts and markers

MIN	ACTIVITY
	<p data-bbox="370 296 1235 342">PRE-TRAINING PREPARATION (<i>con't</i>)</p> <ul data-bbox="370 390 1419 982" style="list-style-type: none"><li data-bbox="370 390 1024 430">❑ Obtain the following supplies (<i>con't</i>):<ul data-bbox="500 474 1419 982" style="list-style-type: none"><li data-bbox="500 474 1122 514">✓ One clock / watch with a minute hand<li data-bbox="500 558 646 598">✓ Candy<li data-bbox="500 642 743 682">✓ Post-It Notes<li data-bbox="500 726 1419 808">✓ One noise maker to end activities and/or grab participants' attention<li data-bbox="500 852 1040 892">✓ All required poster / foam boards<li data-bbox="500 936 1122 976">✓ Something to drink for each facilitator

MIN	ACTIVITY
	<p data-bbox="370 294 1234 346">PRE-TRAINING PREPARATION (<i>con't</i>)</p> <p data-bbox="370 388 1429 472">❑ Write the session objectives in abbreviated form on the flipchart; they include:</p> <hr/> <p data-bbox="370 598 982 661">❑ SESSION OBJECTIVES</p> <p data-bbox="370 703 779 745"><i>Part I: Service Excellence</i></p> <ul data-bbox="495 787 1429 1302" style="list-style-type: none"> ✓ To build our understanding of the REACH for Excellence initiative ✓ To introduce the REACH for Excellence standards ✓ To kick-off our first targeted standard which is <i>Creating Positive Impressions</i> ✓ To examine ways we can support each other in making our organization better ✓ To look at next steps <p data-bbox="462 1386 1331 1438"><i>(Part II Session Objectives appear on the following page)</i></p>

MIN	ACTIVITY
	<p data-bbox="370 296 1235 342">PRE-TRAINING PREPARATION (<i>con't</i>)</p> <p data-bbox="375 478 980 531">☐ SESSION OBJECTIVES</p> <p data-bbox="370 579 894 617"><i>Part II: Engaging Your Audience</i></p> <ul data-bbox="500 663 1398 1003" style="list-style-type: none"><li data-bbox="500 663 1398 747">✓ To provide tools to managers and service champions for sending and reinforcing the message<li data-bbox="500 789 1398 873">✓ To clarify the role that supervisors and managers play in performance management<li data-bbox="500 915 1398 1003">✓ To discuss on-going management development efforts to support the REACH for Excellence initiative

MIN	ACTIVITY
	<p data-bbox="370 296 1235 342">PRE-TRAINING PREPARATION (<i>con't</i>)</p> <p data-bbox="370 390 1382 470"><input type="checkbox"/> Write the next steps in abbreviated form on the flipchart; they include:</p> <hr/> <p data-bbox="375 604 756 653"><input type="checkbox"/> NEXT STEPS</p> <ul data-bbox="500 705 1414 1045" style="list-style-type: none">✓ October 24: Introduce REACH for Excellence in General Orientation✓ Create department-specific behaviors✓ Identify things that need to change in your department✓ January 1, 2006: Employees complete training

MIN	ACTIVITY
	<p data-bbox="370 296 1235 342">PRE-TRAINING PREPARATION (<i>con't</i>)</p> <ul style="list-style-type: none"><li data-bbox="370 390 1386 684"><input type="checkbox"/> Prepare the video equipment<ul style="list-style-type: none"><li data-bbox="500 474 1386 558">✓ Check the equipment before the session to ensure it is operational<li data-bbox="500 600 1386 684">✓ Call x-3416 if you have problems with the audio-visual equipment<li data-bbox="370 726 1406 936"><input type="checkbox"/> Identify specific questions or comments to share with participants when reviewing the Performance Standards Manual<ul style="list-style-type: none"><li data-bbox="500 852 1308 936">✓ Refer to page 35 for more information and sample questions<li data-bbox="370 978 1425 1230"><input type="checkbox"/> Identify one or two scenarios from the Sticky Situations exercise that may easily lend themselves to role playing and that participants (or you and your partner, if necessary) can easily demonstrate<ul style="list-style-type: none"><li data-bbox="500 1188 1149 1230">✓ Refer to pages 63 – 77 for the scenarios<li data-bbox="370 1272 1425 1503"><input type="checkbox"/> Identify key discussion points for each scenario in the Sticky Situations exercise; some information has been provided, but you may wish to add your own thoughts<ul style="list-style-type: none"><li data-bbox="500 1461 1377 1503">✓ Refer to pages 63 – 77 for the scenarios and key points

MIN	ACTIVITY
PRE-TRAINING PREPARATION (<i>con't</i>)	<ul style="list-style-type: none"><li data-bbox="370 390 1398 810">❑ Arrange the room so that participants will be:<ul style="list-style-type: none"><li data-bbox="500 474 1398 558">✓ in small groups (e.g., 4 tables with 5 – 6 participants at each table)<li data-bbox="500 600 1398 684">✓ able to easily form 2 lines or 2 circles for the Line Dance exercise<li data-bbox="500 726 1398 810">✓ able to clearly see the tv screen / monitor to watch the video

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MIN	ACTIVITY
5	<p data-bbox="370 499 630 541">WELCOME</p> <ul style="list-style-type: none"><li data-bbox="370 594 743 636"><input type="checkbox"/> Introduce yourself<li data-bbox="370 678 1385 762"><input type="checkbox"/> Thank participants for arranging their schedules so they could attend this workshop<li data-bbox="370 804 1425 1056"><input type="checkbox"/> Ask participants to turn all pagers, cell phones, etc. either off or to the vibrate mode<ul style="list-style-type: none"><li data-bbox="500 930 1417 1056">✓ Unless you are a member of a code team or have a similar emergency, please wait until the break to return pages, go to the bathroom, etc.<li data-bbox="370 1098 1352 1182"><input type="checkbox"/> Briefly review the agenda – point out the break and the two distinct parts of the training<li data-bbox="370 1224 1425 1308"><input type="checkbox"/> Tell participants that they will work through the content of their Workbook throughout the session<li data-bbox="370 1350 1336 1686"><input type="checkbox"/> Ask participants to introduce themselves, touching on the following points:<ul style="list-style-type: none"><li data-bbox="500 1476 638 1518">✓ Name<li data-bbox="500 1560 963 1602">✓ Department and/or position<li data-bbox="500 1644 1117 1686">✓ Number of years with Saint Raphael's

MIN	ACTIVITY
	<p data-bbox="370 296 1097 338">PURPOSE OF THIS WORKSHOP</p> <ul style="list-style-type: none"> <li data-bbox="370 390 1425 516">❑ Explain the purpose of the workshop to participants by reviewing the session objectives and <i>noting that the goals of this workshop are different from the Employee's Training</i> <hr/> <p data-bbox="375 604 980 653">❑ SESSION OBJECTIVES</p> <p data-bbox="370 705 781 741"><i>Part I: Service Excellence</i></p> <ul style="list-style-type: none"> <li data-bbox="501 789 1409 867">✓ To build our understanding of the REACH for Excellence initiative <li data-bbox="501 919 1304 955">✓ To introduce the REACH for Excellence standards <li data-bbox="501 1003 1390 1081">✓ To kick-off our first targeted standard which is <i>Creating Positive Impressions</i> <li data-bbox="501 1129 1425 1207">✓ To examine ways we can support each other in making our organization better <li data-bbox="501 1255 857 1291">✓ To look at next steps <p data-bbox="370 1346 896 1381"><i>Part II: Engaging Your Audience</i></p> <ul style="list-style-type: none"> <li data-bbox="501 1430 1386 1507">✓ To provide tools to managers and service champions for sending and reinforcing the message <li data-bbox="501 1556 1386 1633">✓ To clarify the role that supervisors and managers play in performance management <li data-bbox="501 1682 1393 1759">✓ To discuss on-going management development efforts to support the REACH for Excellence initiative

MIN

ACTIVITY

WHAT CUSTOMER SERVICE IS AND IS NOT

Remind participants what customer service is and is not using the talking points below

✓ Customer service is NOT:

- a program
- a Band-Aid
- a quick fix
- a passing fad

✓ The REACH for Excellence initiative IS:

- a strategy to help us provide outstanding customer service on a consistent basis to all of our customer which includes you

MIN	ACTIVITY
FYI →	<p data-bbox="370 296 1333 338">BRINGING CUSTOMER SERVICE TO LIFE</p> <p data-bbox="370 390 1414 474">Purpose of Sharing: To give you and the participants an opportunity to connect with and to personalize the experience</p> <p data-bbox="370 562 1292 642"><input type="checkbox"/> Ask participants if they've noticed any changes in how employees are behaving or how our facility looks</p> <p data-bbox="501 688 1333 768">✓ Be prepared to share your own ideas to get the group talking; some changes include:</p> <ul data-bbox="597 821 1422 1409" style="list-style-type: none"><li data-bbox="597 821 1365 900">○ There are now paper towel dispensers in the cafeteria which allow us to clean up minor spills<li data-bbox="597 947 1390 1026">○ More employees are smiling and saying "hello" to each other<li data-bbox="597 1073 1382 1152">○ More employees are stopping to help our patients and guests find their way to their destinations<li data-bbox="597 1199 1422 1278">○ There has been less smoking at the main entrance of the hospital<li data-bbox="597 1325 1382 1409">○ Employees are answering their phones with clear, easy-to-understand greetings

MIN	ACTIVITY
	<p data-bbox="370 296 688 338">TRANSITION:</p> <ul data-bbox="370 401 1430 1178" style="list-style-type: none"><li data-bbox="370 401 1430 516">🗣️ <i>“As you can see, we already have employees embracing this initiative.”</i><li data-bbox="370 569 1430 737">🗣️ <i>“There are employees who want Saint Raphael’s to be a great place to work and a great place in which to receive outstanding medical care.”</i><li data-bbox="370 789 1430 905">🗣️ <i>“But we also know we’re going to have some challenges.”</i><li data-bbox="370 957 1430 1178">🗣️ <i>“Before we get into the details of the REACH for Excellence initiative and the challenges we face, I’d like to spend a few minutes having you share your thoughts and ideas in a fun, interactive way.”</i>


MIN	ACTIVITY
15	<p data-bbox="370 296 1414 346">ICE BREAKER (THE “SEATED” LINE DANCE)</p> <p data-bbox="370 350 699 388"><i>Small Group Exercise</i></p> <p data-bbox="370 436 1419 516">☐ Describe the exercise to participants using the following talking points:</p> <ul data-bbox="500 562 1409 1073" style="list-style-type: none"><li data-bbox="500 562 1409 642">✓ Participants will complete this exercise at their tables as a group<li data-bbox="500 688 1409 768">✓ A series of questions will be asked, and participants must discuss each question among themselves at their tables<li data-bbox="500 814 1409 936">✓ One person in the group will need to record the group’s responses on the flipchart – spelling and neatness do not count<li data-bbox="500 982 1409 1073">✓ Participants will have 1 minute to discuss and respond to each question


MIN	ACTIVITY
	<p data-bbox="370 294 698 346">QUESTION #1:</p> <div data-bbox="370 399 1429 955"><p data-bbox="373 399 1421 619">🗣️ <i>“There’s been a great deal of talk about how we feel about our jobs. We know that one of the reasons that we are focusing on service excellence is to help people feel better.”</i></p><p data-bbox="373 672 1388 955">🗣️ <i>“What I’d like you to do now is use a water metaphor to describe to your teammates how you’re feeling about your job. For instance, you might say that you are “swimming” or “drowning.”</i></p></div> <ul data-bbox="370 1102 982 1228" style="list-style-type: none"><li data-bbox="370 1102 982 1144"><input type="checkbox"/> Allow 1 minute of brief discussion<li data-bbox="370 1186 982 1228"><input type="checkbox"/> After 1 minute, call “TIME”



MIN	ACTIVITY
	<p data-bbox="370 296 699 342">QUESTION #2:</p> <p data-bbox="370 401 1438 621">🗣️ <i>“We also know that we need to focus on the way that we treat each other, because if we take care of each other, we’ll have a lot more to give to our patients and each other.”</i></p> <p data-bbox="370 680 1271 789">🗣️ <i>“But taking care of each other begins with understanding and communication.”</i></p> <p data-bbox="370 848 1425 1010">🗣️ <i>“I’d like you to identify one thing that you REALLY wish other people would understand about your job and share it with your teammates.”</i></p> <p data-bbox="370 1161 980 1199"><input type="checkbox"/> Allow 1 minute of brief discussion</p> <p data-bbox="370 1247 891 1285"><input type="checkbox"/> After 1 minute, call “TIME”</p>



MIN	ACTIVITY
	<p data-bbox="370 296 699 342">QUESTION #3:</p> <div data-bbox="370 401 1443 898" style="border: 1px solid black; padding: 10px;"><p data-bbox="375 407 1430 621">🗣️ <i>“It’s easy to focus on the things that go wrong, but we know that there are times when we do meet – and sometimes even exceed – our customers’ expectations.”</i></p><p data-bbox="375 680 1409 842">🗣️ <i>“I’d like you to identify the things that you HOPE our customers are saying about us and their experiences with us.”</i></p></div> <ul data-bbox="370 995 979 1119" style="list-style-type: none"><li data-bbox="370 995 979 1031">❑ Allow 1 minute of brief discussion<li data-bbox="370 1079 889 1119">❑ After 1 minute, call “TIME”

MIN	ACTIVITY
FYI →	<p data-bbox="370 296 1333 342">SHARING RESPONSES WITH THE GROUP</p> <p data-bbox="370 390 1430 684">Instructions / Purpose of Sharing: The main reason for having participants share their responses with the larger group is so that you will have an idea of where the group is in terms of their understanding of the REACH for Excellence initiative and how they are feeling about the initiative. The questions are designed to make quick points that will be covered in more detail later; the questions help participants understand what is coming later in the session.</p> <ul data-bbox="370 772 1430 982" style="list-style-type: none"><li data-bbox="370 772 1430 898">❑ Tell participants that you will ask them to share some of their own responses or their teammates' responses to the questions just asked<ul data-bbox="500 940 1430 982" style="list-style-type: none"><li data-bbox="500 940 1430 982">✓ Responses will be very quick, “call-out” type responses

MIN	ACTIVITY
<p>FYI →</p>	<p>SHARING RESPONSES WITH THE GROUP <i>(con't)</i></p> <p>Purpose of Question #1: To make the point that many of us feel overwhelmed and that is why it is important that we make sure we don't lose sight of what we need to do for our customers and each other.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p> <i>“What did either you or your teammates say to the question that asked you to describe your job using a water metaphor?”</i></p> </div> <p><input type="checkbox"/> Ask participants to give some quick, “call-out” responses</p> <ul style="list-style-type: none"> ✓ Do not dwell on the responses ✓ Go around the room quickly, rotating from one table to the next to ensure you get at least one response from each table

MIN	ACTIVITY
FYI →	<p data-bbox="370 296 1333 394">SHARING RESPONSES WITH THE GROUP <i>(con't)</i></p> <p data-bbox="370 447 1429 737">Purpose of Question #2: To demonstrate that many of us take each other for granted. We all want to be respected for the work that we do, and more importantly, we would love it if people would begin by getting to know exactly what we are each responsible for doing. Many people will share that they are only one person, that they can't be everywhere at the same time, and that they would like a little understanding from their peers.</p> <div data-bbox="370 827 1446 1104" style="border: 1px solid black; padding: 10px;"> <p data-bbox="375 884 1422 1052">  <i>“And what did you or your teammates say when you had to identify the one thing that you REALLY wished people understood about your job?”</i> </p> </div> <p data-bbox="370 1192 1328 1318"> <input type="checkbox"/> Ask participants to give some quick, “call-out” responses <ul style="list-style-type: none"> ✓ Do not dwell on the responses </p>


MIN	ACTIVITY
FYI →	<p>SHARING RESPONSES WITH THE GROUP <i>(con't)</i></p>
	<p>Purpose of Question #3: To demonstrate that many of us know the kind of experience we want our customers to have and what we hope our customers are saying about us.</p>
	<p> <i>“And finally, what did you or your teammates say when you were asked to identify the things that you HOPE our customers are saying about us and their experiences here?”</i></p>
	<p><input type="checkbox"/> Ask participants to give some quick, “call-out” responses</p> <p style="padding-left: 40px;">✓ Do not dwell on the responses</p>
	<p> <i>“By a show of hands, how many of you believe that our customers really ARE saying those positive things about us?”</i></p> <p><input type="checkbox"/> Encourage participants to raise their hands in response to your question</p>

MIN	ACTIVITY
	<p data-bbox="370 296 1333 394">SHARING RESPONSES WITH THE GROUP <i>(con't)</i></p> <div data-bbox="370 541 1445 762" style="border: 1px solid black; padding: 10px;"> <p data-bbox="370 541 1390 705"> <i>“Now, how many of you believe that some of our customers are actually SAYING SOMETHING DIFFERENT from what we hoped to hear?”</i></p> </div> <p data-bbox="370 852 1414 932"><input type="checkbox"/> Encourage participants to raise their hands in response to your question</p> <div data-bbox="370 1022 1445 1243" style="border: 1px solid black; padding: 10px;"> <p data-bbox="370 1077 1382 1186"> <i>“Give me some quick examples of what you’ve heard our customers ACTUALLY say about us.”</i></p> </div> <p data-bbox="370 1333 1328 1455"><input type="checkbox"/> Ask participants to give some quick, “call-out” responses</p> <ul style="list-style-type: none"> <li data-bbox="500 1417 998 1455">✓ Do not dwell on the responses


MIN	ACTIVITY
	<p data-bbox="370 296 688 338">TRANSITION:</p> <p data-bbox="370 401 1365 621">🗣️ <i>“It appears that we’re doing many things right when it comes to customer service; however, as you’ve identified, there’s still room for improvement.”</i></p> <p data-bbox="370 678 1425 947">🗣️ <i>“We’ll spend the rest of our time today exploring what we can do to improve the service we give our customers, and we’ll talk about how we can make sure that there’s consistency in how we provide that service.”</i></p>

MIN	ACTIVITY
5	<p data-bbox="370 296 1382 394">THE REACH FOR EXCELLENCE PROGRESS REPORT</p> <p data-bbox="370 449 581 485">OVERVIEW</p> <ul style="list-style-type: none"> <li data-bbox="370 533 1422 611"> <input type="checkbox"/> Quickly review the following events to bring participants up to speed on the REACH initiative: <ul style="list-style-type: none"> <li data-bbox="500 659 1422 737">✓ May / June: Introduced the service excellence initiative to all management employees and service champions <li data-bbox="500 785 1122 821">✓ Departments held Staff Alert meetings <li data-bbox="500 869 1398 905">✓ We had a beach party to “officially” kick of the initiative <li data-bbox="500 953 1360 1073">✓ The Coordinating Council approved the recommended behaviors for our first standard – creating positive impressions <li data-bbox="500 1121 1382 1157">✓ Departments began collecting data from their customers <li data-bbox="500 1205 1406 1283">✓ The six committees have been hard at work doing...(give examples) <li data-bbox="500 1331 1422 1451">✓ Forty facilitators completed three days of training in preparation for delivering the employee training sessions – which begin Monday, October 24 <li data-bbox="500 1499 1341 1619">✓ Performance evaluation forms have been changed to reflect the creating positive impressions performance standards <li data-bbox="500 1667 1292 1745">✓ Training programs are being developed to support management employees throughout this initiative

MIN	ACTIVITY
	<p data-bbox="370 296 1382 394">THE REACH FOR EXCELLENCE PROGRESS REPORT (<i>con't</i>)</p> <p data-bbox="370 447 695 485">OVERVIEW (<i>con't</i>)</p> <ul data-bbox="500 531 1422 653" style="list-style-type: none"><li data-bbox="500 531 1422 653">✓ A refresher training course is being created to address employees who continue to demonstrate behaviors that are inconsistent with the performance standards <p data-bbox="370 701 1430 867">☐ Let participants know that many of the things just mentioned – such as performance evaluations, additional management training, and refresher training for employees will be discussed in greater detail today</p>



MIN	ACTIVITY
5	THE REACH FOR EXCELLENCE STANDARDS: OVERVIEW
FYI →	Instructions: Refer to the preprinted poster / foam board entitled Standard Identification
	 <i>“Before we go any further, I think it’s important for you to understand how we got to where we are right now and to understand where we’re headed.”</i>
	<ul style="list-style-type: none"> ❑ Ask participants to turn to page 1 of their Workbook <ul style="list-style-type: none"> ✓ Page 1: REACH for Excellence Standards ❑ Briefly explain the information presented using the talking points listed below <ul style="list-style-type: none"> ✓ The current standard is <i>Creating Positive Impressions</i> ✓ There are five additional future standards that will be introduced organization-wide over the next two to three years <ul style="list-style-type: none"> ○ The future standards are in <i>draft form</i> only

MIN	ACTIVITY
	<p data-bbox="370 296 1430 394">THE REACH FOR EXCELLENCE STANDARDS: OVERVIEW (<i>con't</i>)</p> <ul style="list-style-type: none"> <li data-bbox="370 443 1419 947"> <p data-bbox="370 443 1360 527">❑ Refer participants to the <i>Standard Identification</i> board and discuss using the talking points listed below</p> <ul style="list-style-type: none"> <li data-bbox="500 569 1419 653">✓ The circle in the middle represents our proposed standards and behaviors <li data-bbox="500 695 1360 779">✓ You'll see five different circles that represent different groups of employees <li data-bbox="500 821 1360 947">✓ Each of these groups had input into the standards and behaviors that are going to be introduced as part of the REACH for Excellence initiative <li data-bbox="370 1041 1430 1545"> <p data-bbox="370 1041 1419 1209">❑ Remind participants that just a few minutes ago, they identified the things that they HOPED our customers were saying about us and what they believed our customers were ACTUALLY saying about us</p> <ul style="list-style-type: none"> <li data-bbox="500 1251 1430 1377">✓ Many of the things that participants HOPED our customers were saying about us are things that the members of these multidisciplinary committees said as well <li data-bbox="500 1419 1382 1545">✓ And everything that the committees and the participants are saying have led us to identify and focus on certain standards <li data-bbox="370 1640 1393 1713"> <p data-bbox="370 1640 1393 1713">❑ Tell participants that you'll talk more about <i>Creating Positive Impressions</i> in a minute</p>

MIN	ACTIVITY
FYI →	<p data-bbox="370 296 1432 394">THE REACH FOR EXCELLENCE STANDARDS: OVERVIEW (<i>con't</i>)</p> <p data-bbox="370 447 1352 525">Instructions: Refer to the preprinted poster / foam board entitled Embracing Each Standard</p> <div data-bbox="370 667 1432 890" style="border: 1px solid black; padding: 10px;"> <p data-bbox="375 674 1344 835">  <i>“Quite a bit of work has been taking place throughout the organization as well as in your individual departments.”</i> </p> </div> <p data-bbox="370 982 1414 1060"> <input type="checkbox"/> Refer participants to the <i>Embracing Each Standard</i> board and discuss using the talking points listed below </p> <ul data-bbox="500 1108 1377 1444" style="list-style-type: none"> ✓ The left-hand side (green) represents organization-wide activity ✓ The right-hand side (yellow) represents departmental activity ✓ The information at the bottom (red) represents how the REACH for Excellence standards will be used

MIN	ACTIVITY
	<p data-bbox="370 296 1432 394">THE REACH FOR EXCELLENCE STANDARDS: OVERVIEW (<i>con't</i>)</p> <ul style="list-style-type: none"> <li data-bbox="370 443 1068 485">❑ <i>Embracing Each Standard</i> board (<i>con't</i>) <ul style="list-style-type: none"> <li data-bbox="500 527 1357 611">✓ Walk participants through the organizational activities (green), using the following talking points <ul style="list-style-type: none"> <li data-bbox="597 653 1401 779">○ First, the six standards were identified and specific behaviors have already been developed for the <i>Creating Positive Impressions</i> standard <li data-bbox="597 821 1401 947">○ Second, how well we already demonstrate those behaviors is being measured to establish a baseline of performance <li data-bbox="597 989 1341 1073">○ Next, 40 employees were identified to serve as facilitators <li data-bbox="597 1115 1417 1241">○ All employees – including physicians – will receive training on our first standard, <i>Creating Positive Impressions</i> <li data-bbox="597 1283 1417 1367">○ How well we demonstrate those behaviors after everyone completes training will be measured again <li data-bbox="597 1409 1429 1493">○ There will then be opportunities to reinforce the new behaviors <li data-bbox="597 1535 1406 1661">○ We'll celebrate our successes, and then begin work on the next standard, which is <i>Promoting Positive Teamwork</i>

MIN	ACTIVITY
	<p data-bbox="370 296 1430 394">THE REACH FOR EXCELLENCE STANDARDS: OVERVIEW (<i>con't</i>)</p> <ul style="list-style-type: none"><li data-bbox="370 443 1068 485">❑ <i>Embracing Each Standard</i> board (<i>con't</i>)<ul style="list-style-type: none"><li data-bbox="500 527 1409 653">✓ While all this organizational activity is taking place, there are also specific things that individual departments are doing<ul style="list-style-type: none"><li data-bbox="597 695 1365 821">○ First, departments are expected to take the organization-wide behaviors and determine how they apply specifically to their department<li data-bbox="597 863 1365 947">○ How well we demonstrate these behaviors at the department level will be measured<li data-bbox="597 989 1409 1073">○ And special training to address department-specific needs will be offered<li data-bbox="500 1115 1398 1199">✓ The behaviors associated with each standard will then be incorporated into:<ul style="list-style-type: none"><li data-bbox="597 1241 1308 1293">○ How we <i>hire and orient</i> our new employees<li data-bbox="597 1335 1287 1377">○ How we <i>review and evaluate performance</i><li data-bbox="597 1419 1279 1461">○ How we <i>reward and recognize</i> employees<li data-bbox="597 1503 1040 1545">○ How we <i>celebrate success</i>

MIN	ACTIVITY
	<p data-bbox="370 296 688 338">TRANSITION:</p> <ul style="list-style-type: none"> <li data-bbox="375 405 1430 569">  <i>“As you can tell, we’re really serious about having all Saint Raphael employees take an active role in providing outstanding customer service.”</i> <li data-bbox="375 625 1414 789">  <i>“The first step in helping you provide that service is to identify specific behaviors that correspond to Creating Positive Impressions.”</i>

MIN	ACTIVITY
15	CREATING POSITIVE IMPRESSIONS
FYI →	<p>Instructions: This part of the session has two components: 1) the SRHS video that presents “undesirable” and “desirable” customer service behaviors, and 2) the Performance Standards Manual.</p>
[5]	<p style="text-align: center;">CREATING POSITIVE IMPRESSIONS VIDEO</p> <ul style="list-style-type: none"> <input type="checkbox"/> Tell participants that you are going to show them a video – that was created by Saint Raphael employees – that demonstrates “desirable” and “undesirable” customer service behaviors <input type="checkbox"/> Tell participants that they should be prepared to share with the group at the end of the video some of the “desirable” and “undesirable” behaviors they saw <input type="checkbox"/> Show the video <input type="checkbox"/> Ask participants to quickly share some of the “undesirable” behaviors they saw <input type="checkbox"/> Ask participants to quickly share some of the “desirable” behaviors they saw <input type="checkbox"/> Transition to the <i>Creating Positive Impressions Performance Standards Module</i>

MIN	ACTIVITY
<p>[8]</p> <p>FYI →</p> <p>FYI →</p>	<p>PERFORMANCE STANDARDS MANUAL</p> <p>Instructions: This next activity requires you to walk participants through the <i>Creating Positive Impressions Performance Standards Manual</i>. Where possible, make a connection between the behaviors just demonstrated in the video with the behavioral expectations. Also, make it clear to participants that <i>everyone</i> in the organization <i>will be expected to demonstrate these behaviors</i> and <i>will be held accountable</i> for these behaviors in the performance evaluation process.</p> <p>Throughout this part of the program, it is important to engage participants in the discussion of various behaviors. Below are <i>sample questions</i> that can be used to help engage participants.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Have you ever gone to a store and the clerk <i>never</i> says a word to you – doesn’t even make eye contact with you? How does that make you feel as a customer? <input type="checkbox"/> Have you ever called a business before or even some other part of Saint Raphael’s and the person who answered the phone answered so quickly that you had no idea who you were calling? <p>Instructions: You can also tell a 10-second story that fits with one of the behaviors to illustrate the need to demonstrate the behavior.</p> <ul style="list-style-type: none"> <input type="checkbox"/> The other day I was leaving a store with my hands full of packages, and the guy in front of me let the door shut in my face! Can you imagine how some of our patients feel when we do that to them, especially our elderly patients? Some of our doors are heavy! <input type="checkbox"/> There is someone I pass nearly every day, and every day I say “hello,” yet that person <i>never</i> acknowledges me! I’m going to keep saying “hello” anyway.

MIN**ACTIVITY**

PERFORMANCE STANDARDS MANUAL

- Distribute** copies of the Performance Standards Manual to all participants

- Briefly review** the information presented below
 - ✓ The first page of the Performance Standards Manual provides a reminder of why it is so important for each employee to provide outstanding customer service to all of our customers

 - ✓ All employees will be expected to create positive impressions:
 - ...in personal encounters with all people
 - ...in public areas
 - ...on the telephone
 - ...in writing
 - ...when entering patients' rooms and treatment areas
 - ...through my professional appearance
 - ...in our physical environment

 - ✓ How?
 - ...in many different ways which will be discussed in greater detail

 - ✓ Why?
 - ...because it's what our patients want
 - ...because it's the right thing to do

**PERFORMANCE STANDARDS MANUAL –
PAGE 4: ACTIONS****...in personal encounters with all people**

- Smile
- Make eye contact
- Use positive body language that says “I’m approachable”
- Verbally greet / acknowledge others as you approach and/or pass them
- Acknowledge others when they approach your work station
- Initiate conversation with others when appropriate
- Help others who look lost or confused, escorting them to their destination whenever possible
 - ✓ Walk slowly or at their pace – not yours
 - ✓ Point out significant landmarks (e.g., the cafeteria) to help them get a sense of the building layout
- Know your facility so that you can give correct directions when escorting is not possible
- Maintain confidentiality at all times

**PERFORMANCE STANDARDS MANUAL –
PAGE 4: STATEMENTS****...in personal encounters with all people** Samples of general statements:

- ✓ “Good Morning, _____. How are you?”
- ✓ “Hello. How may I help you?”
- ✓ “Hello _____. Why don’t you have a seat, and I’ll let _____ know you’re here.”

 Samples of way-finding statements:

- ✓ “Hi. My name is _____. Can I help you find something?”
- ✓ “Hi. Are you looking for _____? Let me walk you there.”
- ✓ “This hospital can be a confusing place. Let me help you get to _____.”
- ✓ “Let me walk with you to _____ rather than give you directions. I’ll point out landmarks along the way to help you remember where you need to go in the future.”
- ✓ “Don’t be afraid to ask for directions again on your next visit. We’d be happy to help you.”

**PERFORMANCE STANDARDS MANUAL –
PAGE 5: ACTIONS****...in public areas**

- Hold doors for others
- Yield to wheelchairs, stretchers, patients, and guests
- Let patients and guests get on and off the elevator before you
- Keep your voice down / low, especially when having personal conversations
- Keep personal conversations to a minimum, especially when in the presence of patients and/or the patient is not engaged in the conversation
- Do not gather in public places except in designated areas such as the cafeteria and employee lounges *
- Cell phones may be used only during breaks and lunch / dinner hour and only in designated areas
- Smoke in designated smoking areas only
- Eat and drink in designated areas only (e.g., cafeteria, employee lounges) *
- Do not chew gum at work stations

* specific policies to be determined by individual departments

**PERFORMANCE STANDARDS MANUAL –
PAGE 5: STATEMENTS****...in public areas**

- Sample statements to guests using the elevator:
 - ✓ *If closest to the elevator operating panel, check to ensure all desired floor buttons have been pushed by stating: “What floor are you going to?” or “What floor would you like?”*
 - ✓ *If someone else is closest to the elevator operating panel and your floor button has not been pushed, state: “Would you please press _____ for me? Thank you.”*

**PERFORMANCE STANDARDS MANUAL –
PAGE 6: ACTIONS****...on the telephone**

- Sound interested in what the caller has to say
- Speak slowly and clearly
- Use a proper greeting *
- Ask if you can place someone on hold and get back to him or her if the hold time is extensive
- Before transferring a call, give the caller the name and direct telephone number of the person to whom you are transferring the call
- Alert the person to whom a call is being transferred as to the nature of the call
- Answer the telephone within three to five rings
- Respond to voice mail message within an appropriate time frame (e.g., within 24 hours) *
- Change voice mail greeting to accommodate days away from the office

* specific policies to be determined by individual departments

**PERFORMANCE STANDARDS MANUAL –
PAGE 6: STATEMENTS****...on the telephone**

- Sample statements to use as initial telephone greetings:
 - ✓ “Thank you for calling the Hospital of Saint Raphael. This is _____. How may I help you?”
 - ✓ “Good Morning, _____ Department. This is _____. May I help you?”

- Sample statements to use when transferring calls:
 - ✓ “Sir / Ma’am, I’m unable to answer your questions, but I would like to transfer your call to someone who can help you. Is that okay? ...Great. Do you have a paper and pen handy? I’d like to give you the name and number of the person who can help you before I transfer your call. Ready? The person I’m transferring you to is _____, and his / her direct telephone number is _____. Is there anything else I can help you with before I transfer your call? ...I’ll connect you now.”

*(Sample Statements to Use When Transferring Calls
continues on the next page)*

**PERFORMANCE STANDARDS MANUAL –
PAGE 6: STATEMENTS (*con't*)****...on the telephone**

- Sample statements to use when transferring calls:
 - ✓ “Hello _____. I have a call I’d like to transfer to you. It’s Mr. Jones, and he has a question about _____.”
 - ✓ “Hi, this is _____ from _____. Mr. Jones is on the line, and he’s interested in talking with Dr. Davis. Is she available?”

**PERFORMANCE STANDARDS MANUAL –
PAGE 7: ACTIONS****...in writing**

- Use language that is clear and appropriate to the audience, avoiding technical jargon when appropriate.
- Use business language in all correspondence, including e-mail
- Restrict e-mail to business use
- Respond to e-mail within an appropriate time frame (e.g., within 24 hours) *
- Use the Out-of-Office e-mail function to notify people that you are not in the office
- Include relevant contact information (e.g., name, title, department, address, telephone number) in all correspondence *
- When providing photocopied materials to others, be sure the material is legible

* specific policies to be determined by individual departments

**PERFORMANCE STANDARDS MANUAL –
PAGE 7: STATEMENTS****...in writing**


- Sample statements using non-technical language:
 - ✓ This procedure involves inserting a long, thin guided wire, and we can look through the wire to check the condition of your blood vessels and to see how well your heart is working.

- Sample paragraph with contact information:
 - ✓ If you have any questions, please feel free to contact David Smith in the Finance Department. He can be reached using any of the methods below that are convenient to you.

Telephone: 203 / 789-XXXX

E-mail: dmsith@srhs.org

US Mail: Saint Raphael Healthcare System
1450 Chapel Street
New Haven, CT 06511

MIN	ACTIVITY
	<p data-bbox="370 296 1317 394">PERFORMANCE STANDARDS MANUAL – PAGE 8: ACTIONS</p> <div data-bbox="358 443 1446 1121" style="border: 1px solid black; padding: 10px;"><p data-bbox="375 495 1235 604"> ...when entering patients' rooms and treatment areas</p><ul data-bbox="500 653 1365 1073" style="list-style-type: none"><li data-bbox="500 653 906 695"><input type="checkbox"/> Knock before entering<li data-bbox="500 737 857 779"><input type="checkbox"/> Announce yourself<li data-bbox="500 821 1365 863"><input type="checkbox"/> Introduce yourself to anyone who does not know you<li data-bbox="500 905 1365 989"><input type="checkbox"/> Call patients and guests by their last names (formal names) unless otherwise requested (e.g., Mrs. Smith)<li data-bbox="500 1031 938 1073"><input type="checkbox"/> Do not talk over patients</div>

**PERFORMANCE STANDARDS MANUAL –
PAGE 8: STATEMENTS****...when entering patients' rooms and
treatment areas** Sample statements to patients:

- ✓ “Hello Mr. / Ms. _____. My name is _____, and I’ll be your nurse this evening.”
- ✓ “Hello. My name is _____, and I’m from _____. How would you like me to address you? Is Mrs. Smith okay with you?”
- ✓ “Good Morning, _____. My name is _____, and I need to take your blood pressure and your temperature. Okay?”
- ✓ “Is there anything else I can help you with while I’m here?”

 Sample statements to guests:

- ✓ “Hi. My name is _____, and I’m Mr. Jones’ _____. How are you today?”

**PERFORMANCE STANDARDS MANUAL –
PAGE 9: ACTIONS****...through my professional appearance**

- Properly display SRHS-issued name badge
 - ✓ Name and photo face outward
 - ✓ Badge is worn on the outermost garment
 - ✓ Badge is worn above the waist

- Dress professionally – *every day of the week*
 - ✓ Uniform / dress is appropriate to department, position, and professional role *
 - ✓ Undergarments must not be visible (e.g., waistband of pants must be worn at the waist and underwear must not be visible)
 - ✓ Abdomen must not be visible

* specific policies to be determined by individual departments

**PERFORMANCE STANDARDS MANUAL –
PAGE 9: ACTIONS (*con't*)****...through my professional appearance (*con't*)**

- Be professionally groomed
 - ✓ Clothing, including uniforms, must be clean, neat, pressed, and free from tears and/or holes
 - ✓ Shoes must be clean and free from tears and/or holes
 - ✓ When working in a patient care area, *regardless of position*, closed-toe shoes and stockings or socks must be worn at all times
 - ✓ Hair must be clean and styled appropriately (e.g., hair must not be dyed unusual colors [e.g., hot pink, lime green] or spiked or shaved in unusual patterns)
 - ✓ Head scarves and hats that are not part of one's required uniform must not be worn
 - Tasteful head scarves that are worn as a result of a medical condition or medical treatment are acceptable

(Be Professionally Groomed continues on the next page)

**PERFORMANCE STANDARDS MANUAL –
PAGE 9: ACTIONS (*con't*)****...through my professional appearance (*con't*)**

- Be professionally groomed (*con't*)
 - ✓ Nails must be clean and styled appropriate to one's position, job duties, and specific organization-wide nail policies *
 - ✓ Offensive or extensive visible tattoos are not permitted
 - ✓ Body piercings – other than earlobes – must not be visible
- Maintain good hygiene
 - ✓ Be aware of and take care of bad breath
 - ✓ Be aware of and take care of foul body odor
 - ✓ Complete requisite hand washing techniques

* specific policies to be determined by individual departments

VERY IMPORTANT NOTE:

All employees should refer to the SRHS PERSONAL APPEARANCE policy for additional information regarding personal appearance. The policy can be found on the intranet.

**PERFORMANCE STANDARDS MANUAL –
PAGE 10: ACTIONS****...in our physical environment**

- Keep our facility and your work station clean
 - ✓ Pick up after yourself
 - ✓ Pick up trash on the floor
- Immediately report to Environmental Services personnel areas that are dirty, smelly, and/or unsafe
 - ✓ Immediately address unsafe work areas (e.g., water spilled on floor) yourself, if possible
- Return equipment to its proper location
- Take broken equipment out of service and report it to appropriate personnel
- Display clear, accurate, and adequate signage

**PERFORMANCE STANDARDS MANUAL –
PAGE 10: STATEMENTS****...in our physical environment**

- Sample statements to report problems with physical environment
 - ✓ “Hi. This is _____, and I’m calling to report a problem. There is some sort of liquid spilled on the floor outside the OR Conference Room, and I’m not able to clean the area myself. Could you please send someone to clean up the spill? ...Thank you for taking care of the problem.”
 - ✓ “Hello. This is _____, and I wanted to let you know that the ladies room located between the main hospital lobby and the orange elevators is really dirty. Is it possible to send someone over to clean it? ...Thank you. I appreciate your help.”

MIN	ACTIVITY
	<p data-bbox="370 296 1317 394">PERFORMANCE STANDARDS MANUAL – SUMMARY</p> <ul data-bbox="370 447 1422 867" style="list-style-type: none"><li data-bbox="370 447 1398 569">❑ Emphasize to participants that all of the behaviors just presented are behaviors that we already expect all employees to demonstrate – they are NOT new behaviors<li data-bbox="370 617 1344 739">❑ Tell participants that for some of the behaviors, even more specific behaviors will be developed to meet the needs of individual departments<li data-bbox="370 787 1422 867">❑ Remind participants that, once they leave today’s training, they will be expected to demonstrate these behaviors