



Which Way Are We Rowing: The Power of Sharing Daily Metrics and Goals

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Background: The Mayo Clinic in Rochester has a Centralized Appointment Office (CAO) that handles 660,000 incoming calls, 780,000 outbound calls, 43,000 faxes, 50,000 digital appointment requests, and 101,500 referral orders annually. The CAO leadership team monitored key performance indicators (KPIs) and made decisions on a daily basis to optimize the performance of the team. However, there was a lack of awareness by front-line staff around the KPIs, a lack of understanding for how decisions were made by leadership, and the team was not consistently meeting KPI goals. Meeting KPIs ensures patients are responded to in a timely manner and re-enforces our primary value: the needs of the patient come first. Helping front-line staff understand the importance of their work through our KPIs and providing daily goals was a missing component for staff engagement, awareness, and productivity.

Objective: Improve the performance of the CAO, as measured by the KPIs, by improving engagement of front-line staff and creating a culture of shared and mutual understanding around performance.

Planning/Research Methods: A multidisciplinary team was formed which included CAO leadership, access management analysts and front-line staff. A literature review was conducted to gather ideas on how to improve engagement of front-line staff. In reviewing the literature, there was a clear link in performance between teams that understood their priorities and goals and teams that met their priorities and goals. Based on this review and brainstorming sessions, the team came up with a list of potential interventions. The interventions were then prioritized based on short, medium and long-term goals. After the interventions were developed, a daily metrics email template was formulated and refined based upon front-line staff feedback. The daily metrics email was socialized at team meetings and changes were implemented based upon their feedback in making the KPIs easy for front-line staff to understand.

Interventions Implemented:

- Defined access metric goals with clearly defined status levels (red, orange, yellow, and green) and specific actions taken at each level such as offering of overtime, time off, and prioritization of tasks such as projects and training initiatives.
- Created a daily metrics email of KPIs and key messages to share with the entire team to increase their situational awareness and understanding of the CAO's performance.
- Real-time monitoring of phone and agent-level metrics by supervision to ensure KPIs are met during fluctuations of demand throughout the day and by day of week.
- Started a morning daily huddle for the management team to make staffing adjustments based upon workload and current-state KPIs.

Results: Improved performance as measured by the following KPIs:

KPI	Goal/Target	Before	After
Avg. speed of answer (phone)	≤ 30 seconds	51 seconds	17 seconds
Abandonment rate (phone)	≤ 5%	6.10 %	2.95 %
Digital appointment requests	≤ 2 business days	5 business days	Within 1 business day
Faxed referrals	≤ 1 business day	5 business days	Within 1 business day

The team is harmoniously rowing together and consistently achieving or exceeding the KPI targets to best serve our patients. Front-line staff is engaged, take pride in their performance, and often are the first to offer additional help as a result of their KPI awareness.

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