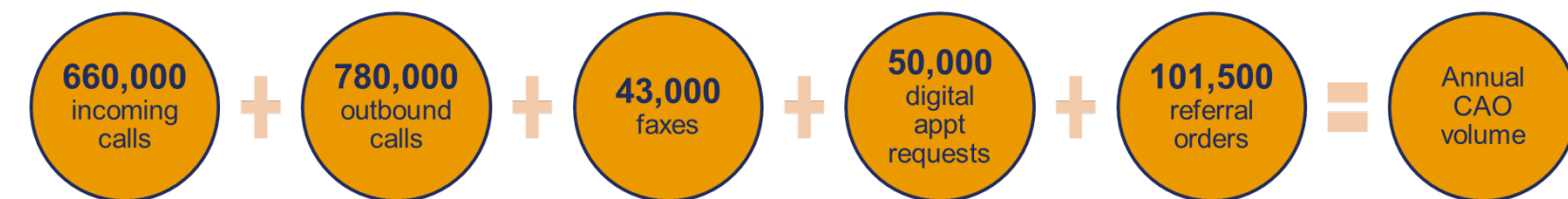# Which Way Are We Rowing: The Power of Sharing Daily Metrics and Goals

Michael Kahn, M.B.A.; Mary Owen, M.A.; Laura Tibor, M.B.A.; Christopher Tommaso, M.S.

Mayo Clinic in Rochester, MN

Background

Mayo Clinic in Rochester has a Centralized Appointment Office (CAO) that handles incoming calls, outbound calls, faxes, digital appointment requests, and referral orders.

660,000 incoming calls + 780,000 outbound calls + 43,000 faxes + 50,000 digital appt requests + 101,500 referral orders = Annual CAO volume

The CAO leadership team monitored key performance indicators (KPIs) and made decisions on a daily basis to optimize the performance of the team.

KPI goals were not consistently being met. KPIs ensure patient requests are responded to in a timely manner and re-enforces our primary value: the needs of the patient come first.

Objectives

Improve performance of the CAO, as measured by the KPIs, by increasing engagement of frontline staff and creating a culture of shared and mutual understanding around priorities and goals.

- Average speed to answer (ASA) phones ≤ 30 seconds
- Phone abandonment rate ≤ 5%
- Response time to digital appointment requests ≤ 2 business days
- Response time to faxed referrals ≤ 1 business day

Methods

Multidisciplinary team: Comprised of CAO leadership, access management analysts and frontline staff.

Literature review: There was a clear link in performance between teams that understood their priorities and goals and teams that met their priorities and goals.

Feedback sessions: Several sessions with staff were utilized to better understand why the team was not consistently meeting goals and to generate a list of potential solutions.

Prioritization: Interventions were prioritized based on short, medium and long-term goals. After the interventions were developed, a daily KPI email template was formulated and refined based upon staff feedback.

Change management: The daily KPI email was socialized at team meetings. Improvements were implemented based on their feedback so that KPIs could be easier to understand.

Analysis

- Staff had a lack of awareness and understanding about the KPIs impacting their engagement, awareness and productivity.

- KPI status was not shared regularly with staff.

- Leadership decision making based on KPIs was not well understood by staff.

Interventions

1. Created a **daily KPI email** and key messages to share with the team to increase situational awareness and understanding of performance (figure 1).

2. Implemented **incoming call screens** in the work areas to create real-time awareness by staff (figure 2).

3. Defined **access metric thresholds and actions** (figure 3).
   - Clearly defined levels for red, orange, yellow, and green status.
   - Leadership actions for each level were documented and available to staff including offering of overtime, time off, and prioritization of projects and training initiatives

4. Started a **morning daily huddle** for the leadership team to make staffing adjustments based on workload and KPI performance.

Figure 2: Work Area Call Screens

Figure 1: Daily KPI Email

Daily emails are sent to staff from leadership:

Good Morning Team,

Key daily messages and encouraging messages are shared in this section for awareness and/or reminders.

Rochester Central Appointment Office Daily Metrics
Date: 2/7/2020
Day of Week: Friday

Phone Metrics	Average Speed to Answer	Target ASA	Abandon Rate	Call Volume
New Patient Requests	:13	0:30 or less	1.62%	971
New Referrals	:05	0:30 or less	1.19%	250
Digital Patient Requests	:12	0:30 or less	1.64%	60
Ancillary Testing Referrals	:07	0:30 or less	1.79%	55
Faxed Referrals	:00	0:30 or less	0.00%	47
CareLink Referrals	:06	0:30 or less	0.00%	9
Online Services for Referrals	:01	0:30 or less	0.00%	126
Reschedule	:10	0:30 or less	0.45%	220

Waiting Requests		# of Requests	Actual Date (Working)	Target Date
Digital Appointment Requests				
	New Request Tee-Ups	207	2/7/2020 Friday	Business Day Prior or Less
	Call Me Anytime	13	2/7/2020 Friday	Two Business Days Prior or Less
	Scheduled Calls	58	Current Day	Same Day
Faxed Referrals				
	Unprocessed Faxes	130	2/7/2020 Friday	Business Day Prior or Less
	Red-Folder Faxes	70		
Automated Appointment Reminders				
	2 Week	130	Same Day	Same Business Day as Populated
	7 Day	106	Same Day	Same Business Day as Populated

Epic Workqueues	Beginning Total	Orders Added	Orders Taken Off
RST CAO ECL ANCILLARY TESTS WQ	0	4	4
RST CAO ECL EBOARDS WQ	0	2	1
RST CAO ECL ECONSULTS WQ	58	35	41
RST CAO ECL EREVIEW WQ	6	6	6
RST CAO ECL REFERRALS WQ	43	111	128
RST CAO ECL SPECIALTY CONTRACT REFERRALS	0	4	2
RST CAO ECL VIDEO WQ	0	0	0
RST CAO MCHS ECONSULT WQ	2	11	13
RST CAO MCHS REFERRAL WQ	33	258	248
RST CAO MCHS-MN ATS WQ	21	147	143
RST CAO MCHS-WI ATS WQ	4	24	24
RST CAO REQUESTS WQ	13	932	916

Figure 3: Access Metrics Thresholds

Access metric thresholds were defined to guide leadership on appropriate action.

Access Level Red	>2 min ASA or >20% Abandoned Rate
Access Level Orange	>1 min – 2 min ASA or 10%-20% Abandoned Rate
Access Level Yellow	31 sec -1 min ASA or 5-10% Abandoned Rate
Access Level Green	<30 seconds ASA or <3% Abandoned Rate

Actions for each level include:
- Communication of status to team
- Time off and overtime approval
- Holiday week flex time
- Training initiatives and asynchronous work prioritization
- Supervisor duties
- Leadership availability on-site for real-time skilling and issue escalation

Results

The team is harmoniously rowing together and consistently achieving or exceeding the KPI targets to best serve our patients. Staff are engaged, take pride in their performance, and are proactively offering to help as a result of their KPI awareness.

KPI	Goal/Target	Before	After
Average speed to answer phones (seconds)	≤ 30	51	17
Phone abandonment rate	≤ 5%	6.10%	2.95%
Response time to digital appointment requests (business days)	≤ 2	5	≤ 1
Response time to faxed referrals (business days)	≤ 1	5	≤ 1

References

- Wolf, Leslie. What Gets Measured Gets Done: Key Performance Indicators. 2010.
- Henderson, Ruth. What Gets Measured Gets Done. Or Does It? 2015.
- The Manager's Guide to Engaging Staff. *Advisory Board*. 2016; 17-21.
- Get Your Frontline Staff Rowing in the Right Direction. *Advisory Board*. 2012.