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

Background

The CAO leadership team monitored key performance indicators (KPIs) and made decisions on the 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.

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 did not understand 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 frontline staff feedback.

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).

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

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.

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

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Figure 1: Daily KPI Email

Daily emails are sent to staff from leadership:

- 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.

Figure 2: Work Area Call Screens

Figure 3: Access Metrics Thresholds

<table>
<thead>
<tr>
<th>Access Level</th>
<th>ASA (seconds)</th>
<th>ASA %</th>
<th>Percentage of Calls Answered</th>
<th>Response Time to Digital Appts.</th>
<th>Response Time to Fax Referrals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red</td>
<td>≥ 30</td>
<td>5%</td>
<td>85%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Orange</td>
<td>30 ≤ ASA ≤ 35</td>
<td>6%</td>
<td>75%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Yellow</td>
<td>35 ≤ ASA ≤ 40</td>
<td>7%</td>
<td>65%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Green</td>
<td>&lt; 40</td>
<td>8%</td>
<td>55%</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Analysis

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

References

- Get Your Frontline Staff Rowing in the Right Direction. Advisory Board. 2012.