

CAPTURING PATIENT EXPERIENCE



CURRENT CHALLENGES & FUTURE NEEDS



INSIGHT REPORT



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Executive Summary

Traditional patient experience survey solutions suffer from three clear shortcomings: They are too long, they capture retrospective data, and they use outdated phone- and paper-based methodologies to gather data. Today's Chief Patient Experience Officers (CXOs) increasingly need near-real-time information about patient sentiment in order to improve the care experience while someone is still in the hospital or within days (and not weeks) of discharge.

This Insight Report examines the market for patient experience and satisfaction survey solutions, with a particular focus on the unmet needs of healthcare organizations (HCOs) trying to capture patient sentiment at the point of care. The research is based primarily on interviews with 11 individuals in a CXO or Director of Patient Experience role at an AMC, IDN, or IPA. (For the sake of brevity, all such individuals are hereafter referred to as CXOs.)

This report identifies the primary goals of individuals in the CXO roles, describes the ways that point-of-care survey solutions can help CXOs gather a broad range of granular data to measure their organizations' progress toward meeting those goals, explains what HCOs should look for when evaluating point-of-care survey solutions, and describes opportunities for vendors to further support CXOs in their efforts to improve the patient experience.

Among the CXOs interviewed, the most pressing need is insight into the patient experience at the point of care (both from a survey perspective and a data analytics perspective). Employee satisfaction surveys represented a less pressing need, but Chilmark Research expects this need to grow in importance as HCOs struggle to manage the workload of clinical staff who are asked to do more to improve the patient experience. We believe there are market opportunities for vendors that can provide solutions that link these metrics – patient experience at the point of care and employee satisfaction – to an organization's specific goals for improving patient experience.

KEY TAKEAWAYS

Focus on pragmatic patient experience goals. Many CXOs say the main goals for the patient experience office revolve around improving individual HCAHPS metrics or quality metrics tied to payer contracts. In other words, these goals are fairly pragmatic and defined by measurable data.

HCOs gain value from open-ended responses. CXOs say individual, open-ended responses on patient experience surveys are often more valuable than visual representations of quantitative data, since those responses can pinpoint specific issues or areas of concern.

Provide insight into business line performance. Patient experience goals often span an entire HCO, but the steps or reforms necessary for achieving those goals are often only applied on a departmental level. Survey solutions extensible enough to apply to multiple business lines will help an HCO bring surveys to scale and address a variety of business-line needs at the same time.

Deliver insight that HCOs can act on quickly. Whether delivered by phone or mail, the typical CAHPS survey is administered weeks after a care episode. To truly provide n=1 improvement to the patient experience, HCOs need insight much sooner – even before the care episode is over in some cases – so they can act quickly and solve the problem.

Make data and insight actionable. CXOs want insights from survey solutions that are directly tied to the patient experience goals of their organization, complete with indicators of how far they have progressed in achieving those goals and what will happen if they miss the mark. HCOs also want this information aggregated in one place and are willing to let vendors host this data.

Explore less common metrics. HCOs use two metrics infrequently: Employee satisfaction (an indicator of burn-out, which directly impacts patient experience) and Net Promotor Score (an indicator of whether patients will recommend an organization). Surveys based on these metrics could provide insight beyond the typical HCAHPS, quality, safety, and operational data.

Consider a breadth of offerings. Beyond the patient experience survey, additional survey options range from employee satisfaction to leadership rounding to customizable surveys for different business lines. Such offerings help HCOs make an investment that can scale beyond the inpatient setting – and help vendors sell multiple solutions.

About the Author



Brian Eastwood joined Chilmark Research in June 2015. His research focuses on the role that provider, payer and personal technology can play in advancing consumer-driven health and empowering consumers to make healthy decisions.

Prior to joining Chilmark Brian spent 12 years as a journalist, with more than five years of experience covering the healthcare industry at Fierce Markets, CIO.com and TechTarget. He has covered topics such as meaningful use, HIE, fitness tech, interoperability, analytics, innovation and the health insurance industry.

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